

AN AIR FORCE GUIDE FOR EFFECTIVE  
MEETING MANAGEMENT

THESIS

Zackery S. Belcher, Captain, USAF

AFIT/GCM/LAS/95S-2

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AN AIR FORCE GUIDE FOR EFFECTIVE MEETING MANAGEMENT

THESIS

Presented to the Faculty of the School of Logistics and  
Acquisition Management  
Air Education and Training Command  
In Partial Fulfillment of the  
Requirements for the Degree of  
Master of Science in Contracting Management

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Captain, USAF

September 1995

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### Preface

The idea for this research was born through the many hours my thesis advisor, Major T. Scott Graham, and I have spent in unproductive and ineffective meetings. My specific goal was to help put a small dent in the continuing problem of ineffective organizational meetings. Fortunately, with the help and encouragement of Major Graham, I feel I have succeeded in accomplishing my goal.

In accomplishing this thesis I have been the recipient of invaluable assistance and support. Specifically, I am indebted to Major Graham for his trust, guidance, and willingness to let me make this my research. In addition, I am thankful for the enthusiasm and dedication of my seven Delphi experts. Next, I want to acknowledge my peers for their friendship and camaraderie over these many months. To my loving wife, Nancy, I can never express my thanks for your complete support, unending patience, and motivating encouragement. Once again we have experienced an adventure.

Finally, I thank the Lord above. He has chosen to bless me with abilities and His grace, both of which I am wholly undeserving.

Zackery S. Belcher

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Abstract

The purpose of this research was to improve the effectiveness of organizational meetings, thereby reducing the waste from ineffective meetings. Specifically, this thesis sought to answer three research questions addressing the essential elements for effective meetings, the benefits from productive meetings, and the information and skills critical to conducting meetings.

The research questions were essentially answered through a comprehensive literature review and the use of the Delphi Technique. However, the solicitation of meeting materials from 16 Malcolm Baldridge National Quality Award winners and 90 Fortune 1,000 firms provided additional information. Seven experts, representing Air Force and industry, participated in two rounds of the Delphi Technique.

The research identified the need for a concise and realistic length management tool to instruct managers on how to conduct effective meetings. Further, research highlighted that few corporations in industry have such a tool, even among those firms recognized as being the pinnacle of quality.

The culmination of this effort was the development of an effective meeting management guide to outline and discuss the key elements for preparing and conducting organizational

meetings. Recommendations to implement effective meeting management training using the guide are discussed.

## AN AIR FORCE GUIDE FOR EFFECTIVE MEETING MANAGEMENT

### I. Introduction

#### General Issue

Nero fiddled while Rome burned. Do you know why? Nero was in a meeting (26:2). Actually, the basic meeting is integral to modern business and government, and yet is the most time wasting activity for most managers (15:12; 23:34). In fact, in a 1983 study of 471 managers, 70% responded that most meetings are a waste of time. Further, 78% of the managers stated that they had never received training on how to conduct meetings (65:48). This poses the question as to how we are going to improve meetings if managers are not being trained. Unfortunately, it appears that most people only expect to complain about meetings and never plan to work towards actually improving them. This attitude is reflected by humorist Dave Barry who wrote, "There are two major kinds of work in the modern corporation or organization: 1. Taking phone messages for people who are in meetings; and 2. Going to meetings" (6). Going one step further, as workers earn their way into management positions, they cannot only count on more responsibility, but also on being members of the meeting club (76:68). That is, spending an increasingly greater amount of their time each day in meetings.

So what is written on the topic of improving organizational meetings? There is extremely little information, in the way of true research, on the subject of meeting effectiveness. This is especially true when compared to other organizational problems. The one area of organizational meetings where current research is taking place is in regards to group decision support systems. Group decision support systems incorporate computers and specialized software in meetings to improve the meeting process (1:22; 2:37; 17:48). Group decision support systems are not the focus of this research because the purpose of this research is to help organizations of all sizes and types improve their meetings. Unfortunately, group decision support systems require extensive computer resources that many organizations are not equipped for and cannot afford. Therefore, the study of such systems is not as applicable as general meeting skills and methods.

In focusing on improving organizational meetings, the primary documentation consists of three mediums. The first medium appears in trade journals and consists of short bullet-type articles addressing narrow areas of meeting conduct. The second medium consists of expansive books written for those wanting to train themselves in running productive meetings. The third medium includes books written on the general topic of management with some brief coverage of organizational meetings. Beyond trade journals and the two types of books, there is very

little other research. Thus, there is a need for some form of examination into what makes a quality meeting.

What is being done to improve the wastefulness of meetings? From the current management literature, it appears very little. Some organizations, such as 3M, have organized special internal divisions with the primary purpose of finding ways to improve meetings and communicating those methods to corporate members. Other organizations adopt the fairly rigid meeting format and conduct prescribed by both Robert's Rules of Order and Parliamentary Procedures (26:5; 77:99). Many organizations find the rules, bylaws, motions, and level of formalization found in Robert's Rules of Order and Parliamentary Procedures cumbersome. The majority of organizations do neither of the above courses of action; they do not attempt to establish rules or procedures and, as a result, provide no training or direction to their employees regarding meetings. The outcome is a large group of people who take nonachievement and nonenjoyment of meetings as a part of normal everyday life (26:7). A goal of this research effort is to suggest that this does not have to be the default response.

Next, what special training are managers receiving? Again, current management literature reveals managers are receiving virtually no special training. According to 3M, even minimal training on running meetings can increase meeting productivity up to 58% while reducing meeting times by 28% (71:1). It seems unconscionable for American businesses and

government to have this information available and do nothing with it. However, the blame does not rest with the organizational leaders alone. It also falls on the shoulders of the employees. If employees and managers alike were to demand some form of change rather than accepting the status quo, chances are positive action would result. By accepting poor meetings as a fact of life, associates serve to only aid in clogging the system and eroding the quality of working life for everyone involved.

In addition, it is vital to remember that meetings are simply a condensed microcosm of the values and structure of the parent organization (26:5, 9:5). Taken from the perspective that most meetings are inefficient and ineffective, it stands to reason that most organizations also display inefficiency and ineffectiveness. For meetings to change, organizations must change. Many business and government organizations are either in the middle of, or coming out of, vast reorganization and restructuring. For those organizations, timing may be appropriate for such an organizational culture change.

So far, this research has established three important points. The first point is that many organizational meetings are ineffective as viewed by the meeting attendees. The second is that there is extremely little research conducted on the subject of conducting effective organizational meetings outside of shallow trade articles and overly comprehensive specialty books. As a result, managers seeking information on how to

conduct effective meetings are given the choice between too little and too much information. The third point is that only a few organizations consciously address the problem of ineffective meetings by establishing guidelines and implementing meeting training. Given this background, what should be done? The answer to this question is quite straightforward; managers need guidance on what constitutes a quality meeting and how to conduct a quality meeting.

The importance of purposefully focusing on meeting guidance is easy to understand by remembering three things. First, every time a meeting is held it costs the organization money (40:14). These costs add up and some estimate that between 7% and 15% of an organization's total personnel budget is spent directly on meetings (25:4). Second, a hidden cost of ineffective meetings is the cost associated with having managers unavailable when they are needed (26:8). This means that people within and without the organization are blocked from engaging the wisdom and efforts of those in meetings. In addition, when meeting participants are finished with the meeting, they return to stacked call-back slips and a line of people waiting anxiously for their time. Finally, consider the emotional impacts on those involved. When people feel their time is being wasted, their attitudes are negative, their tempers flare, and conflicts surface. With an average of over 17 million meetings taking place each business day, and the aforementioned three factors being multiplied by the number of meetings, it is vital

that everything possible is done to make organizational meetings productive and effective (64:70).

#### Problem Statement

The significant problem is that organizations, the U.S. Air Force included, waste incredible amounts of time by having personnel sit through unproductive meetings. While there is virtual consensus among organization leaders and personnel, little is being done to correct the situation. Unfortunately, formalized past research is essentially non-existent and organizations are left with the choice between a conglomeration of small article series describing do-it-yourself tips for improving meetings or explicitly detailed and comprehensive books. Therefore, American organizations need something more complete, user friendly, and accurate to assist them in improving meetings. However, executives are busy and do not have time to wade through lengthy books. Managers need a tool that is only as detailed as absolutely necessary, concise, and of realistic length. This research is aimed at providing the information managers need in the form of a comprehensive guide for use by managers at every organization level.

#### Research Objectives

The purpose of this research is to:

- A) determine what the essential elements for effective meetings are;

- B) determine what benefits accrue to both organizations and meeting leaders when meetings are productive; and
- C) write a detailed and comprehensive meeting guide that can serve as a training manual on conducting efficient and effective meetings.

#### Research Questions

The research objectives are addressed via the following research questions:

1. What are the essential elements of effective meetings and how are they planned for and implemented?
2. What are the benefits that result from conducting productive meetings?
3. What information and skills are critical for meeting leaders to know and understand when conducting meetings?

These questions are answered through three forums. First, a review of the related literature provides the background for effective meetings to include detailed information addressing each of the three research questions. Second, through the requested assistance of 90 Fortune 1,000 companies and 16 of the past Malcolm Baldridge National Quality Award winners, I expected to gather a small sample of industry guides and manuals currently in use. These guides will provide the views of various business entities in relation to the research questions. The Fortune 1,000 listing represents the 1,000 largest firms in America and includes both manufacturing and service oriented firms. In addition, it represents a large cross-section of

firms ranging from huge conglomerates to small regional corporations. For this effort, 90 firms will be randomly selected from the listing. Sixteen previous Malcolm Baldridge National Quality Award winners will be contacted due to their recognized excellence and pursuit of quality. Third, through use of the Delphi method seven experts will assist in the evaluation and finalization of a meeting guide. The information gathered through the first two parts of the three part process will help form the foundation of the comprehensive meeting guide while the third part will help finalize the guide.

#### Assumptions

A portion of the 106 companies contacted, to include the Malcolm Baldridge National Quality Award winners, and listed in Appendices A and B, will have in place procedures for conducting meetings. It is not expected that there will be a large group of companies with such procedures due to the lack of emphasis industry has placed in this area. However, with the focus on quality during the past 15, some firms will likely have addressed the importance of conducting meetings through an internal guide. Of those who have such procedures, only a small percentage may be willing to share their information with the Air Force.

#### Limitations

As previously mentioned, there are essentially three types of commercial material in print regarding meetings -- short

articles, complete books, and small sections in general management books. The lack of working guides and journal research is a limitation because it makes writing a concise Air Force guide more difficult. This is due to the many choices in determining what information is truly essential and how to best communicate and present the information to readers. On the other hand, because guides are rare, it re-affirms the need for such an instrument for the Air Force.

#### Conclusion

This chapter has provided a general discussion of the research problem, background on the issue, and presented the research questions that will be answered to fulfill the research objective. The second chapter presents a discussion of the relevant literature review.

### III. Literature Review

#### Introduction

Meetings are an essential part of every organization's daily activities and are where most of the work that an organization believes to be important takes place (7:56). Meetings are essential because few other forums provide the opportunity to gather information, disseminate information, provide training, and assist in decision making as well as meetings. However, the measure of the success or failure of any meeting is how well the objectives are met. Unfortunately, many organizational meetings in America are not successful because those leading the meetings either do not know how to conduct a meeting or do not make the preparation effort to ensure a successful meeting. Further, few meetings even begin with the leader precisely knowing the purpose of the meeting and the specific objectives. Therefore, before holding a meeting the meeting leader should understand the principles of effective meeting management, have a clear objective for the meeting, and properly prepare administratively for the success of the meeting. As stated in the first chapter, the objective of this thesis is to determine the essential elements of effective meetings, the benefits of productive meetings, and to write a guide for Air Force personnel on how to execute planned, efficient, and effective organizational meetings. This

literature review focuses on the background of meetings and identify the important elements of meeting success.

This chapter is divided into six distinct sections arranged essentially in chronological order to cover the necessary steps of meeting planning. The first section discusses how American organizations need effective meeting management by examining the history of meetings and their costs. The second section discusses the reasons we need to concern ourselves as individuals with meetings. The third section addresses the preparation and planning necessary before a meeting ever takes place. The fourth section covers the administration necessary before sitting down to meet. Actual conduct within meetings is the subject of the fifth section, and the final section focuses on the necessary activities following each meeting.

#### History and Costs

Meetings occur whenever two or more people exchange information. They are not restricted to any one purpose, style, or structure, and can be found taking place within churches, clubs, political groups, businesses, schools, the military, and many other organizations. Because meetings have become the primary tool of gathering and exchanging information, they number in the millions each day (64:70). With the sheer quantity of meetings, the costs associated with meetings are tremendous.

Meeting Evolution. The methods and rules with which organizations run meetings today stem both from those used by the British Parliament and English common law proceedings dating back approximately 600 years. These rules were codified in 1801 by Vice President Thomas Jefferson for use by the U.S. Senate (10:74). In 1876, Mr. Robert adapted the parliamentary style rules of order and procedures for use in common organizations -- clubs, societies, and associations. His adaptation became quite well known as Robert's Rules of Order (77:99). However, in the last 119 years American society evolved from the social club and association being a central part in a person's life, to the corporate organization being central. Along the way membership in associations, such as the Rotary Club, the Masons, and Eastern Star, have declined. In this societal evolution the formal parliamentary rules and procedures that were once quite popular and well known have primarily disappeared. The result is that Americans of today are not only unfamiliar with organized meetings, but they also do not know how to properly plan and conduct organized meetings. Further, American organizations now face the reality of meetings being poorly organized and unproductive on a daily basis without knowing how to fix the situation.

Meeting Costs. The ramifications of poorly conducted meetings are staggering. Studies find that managers typically spend 30% to 80% of their day in meetings, with the variation due to differences in organization structure, type, and

industry, along with the position of the manager (3:36; 23:35; 46:53; 50:23; 55:95; 67:28; 80:7). In addition to the planned meetings that are so prevalent in organizations, there are also the unscheduled pop-in meetings that managers face (51:4). Unplanned meetings are a particular source of frustration in that they interfere with normal operations. Unplanned meetings can occur as a result of a phone call from a customer, in response to a disturbing project status report, because someone is afraid to make a decision alone, or for countless other reasons.

To put the quantity of time managers spend in meetings in the proper context, approximately 20 weeks of every manager's work year consists of attending some form of meeting. Unfortunately, additional estimates show that 6 of those 20 weeks are a complete waste of time (53:41; 63:29). As proof of the meeting problem, surveys show that unproductive meetings consistently rank near the top of managerial complaints (4:19). Moreover, the effects of ineffective meetings are not isolated to the individual meeting itself. Rather, meetings build upon themselves to create weekly meetings and follow-up meetings (15:12; 47:52). Thus, the time spent in one meeting easily grows into two, three, or four follow-on meetings. The result is a compounding of the original problem -- most managers do not know how to run effective meetings and end up wasting the time of those who attend. Interestingly enough, not all societies face this same problem. A study of 40 Korean senior executives

found that they spend about 24% of their time in meetings, which is far lower than the average American senior executive (51:5). Further, the Korean executives perceive their meetings to be more productive. Specifically, Korean executives believe that approximately 75% of their meeting time is productive as compared to 71% for American executives (51:5; 53:41). One explanation of the difference is due to philosophical differences in management practices between the two countries. For example, many meetings held in Asian countries are to gather information that eventually will lead to a decision, though the decision itself is not made in the meeting. In contrast, the purpose of many American meetings is often to actually make the decision (31:66). Therefore, in America more time is spent trying to cover available alternatives and to reach a consensus.

Notwithstanding the frustration of managers as a result of the number of meetings they attend, there is also the salary cost consideration of unproductive meetings. Table 1 gives an example of the hourly cost of time spent sitting in organizational meetings.

Table 1. Average Hourly Cost of Meetings (41:124; 71:2)

Annual Salary Per Person		2	4	6	8	10
\$50,000	\$96	\$192	\$288	\$385	\$481	
\$40,000	\$77	\$154	\$231	\$308	\$385	
\$30,000	\$57	\$115	\$173	\$231	\$288	
\$20,000	\$38	\$77	\$115	\$154	\$192	
Number of Attendees						

When the figures from Table 1 are paired to the approximately 17 million meetings held each day, the total cost of meetings is astonishing (64:70). Thus, it is easy to understand that meetings use important organization resources -- people, time, and money. Since it is the responsibility of management to use resources efficiently, it is therefore necessary for management to improve the quality and productivity of meetings in American organizations.

#### Importance of Effective Meeting Skills

This literature review has focused extensively on the fact that improving meeting effectiveness and productivity will benefit the parent organization. However, knowing how to run effective meetings is a skill that can benefit everyone in their career. Therefore, personal gain and advancement is an additional motivator for the individual to learn and practice meeting management skills.

"[B]ecause so many meetings today are considered wastes of time, the supervisor who builds a reputation for holding a good meeting draws favorable attention" (3:35). Since most Air Force personnel are not trained in how to improve their group communication skills, they should do everything possible to gain such training. This is of such importance at every level in the organization that one study of high level Korean executives found that 92.5% believed managers should learn meeting skills. Further, 97.5% believed subordinates should also learn to run meetings to prepare them for future positions (51:10). As both

the previous quotation and the study findings show, meeting skills are an important means to success in organizations worldwide (10:71; 47:52).

Consider the quantity of meetings in which an individual sits, participates, and later leads, yet most never learn how to lead meetings effectively. This is unfortunate because in meetings judgments are made about a person's effectiveness (47:52). High level leaders are exposed to only a small part of a subordinate's capabilities but from this exposure they base their opinions. For example, the following questions are similar to what leaders ask themselves when observing subordinates in meetings. Is this person able to use meetings as a powerful tool? Is this person a passive participant or a focused manager? Does this person set priorities and can he listen? Can this person handle the responsibility needed to manage effectively (47:52)? Knowing that meetings are the forum where we send signals about our professionalism and capability, each of us possess the knowledge to improve. Because American organizations, to include the Air Force, seem to take poorly run meetings for granted, the word spreads quickly in subordinate and supervisor channels when a person does run a quality meeting. The lesson is that meetings are an excellent place to gain visibility as both a participant and leader and it is as simple as mastering the concepts discussed in the remainder of this chapter (19:58). To put the situation in the proper perspective, one author stated that every meeting an individual

participates in is a job evaluation (47:52). Therefore, just as for an evaluation, meeting leaders should plan and prepare for meetings.

#### Preparation and Planning

Before a meeting occurs, there are several areas of preparation and planning that need addressing. Areas the leader should be concerned about include whether the meeting is really necessary, what purposes are best served by meetings, and the available alternatives to formal meetings.

Meeting Preparation. A vital element in running a meeting effectively is thorough planning. Lack of advance planning and preparation virtually guarantees to result in a poor meeting (8:43). In fact, if more time was spent in preparation it is likely that both the number of hours spent in meetings and the time wasted in meetings would decrease (15:12). By simply having a game plan of what to cover and knowing what constitutes completion, many meetings would run far shorter. However, before the details of a meeting can be planned, the meeting leader should first ask the question of whether the meeting is even necessary (67:27; 76:68; 78:61). By using this acid-test many meetings would not take place, and therefore the associated unproductivity and morale problems would be correspondingly reduced. This point goes one step further and is applicable for those tasked to attend meetings. They too should ask the same question to the meeting initiator (50:22). By eliminating unnecessary meetings the meeting leader informs others that the

leader believes their time is valuable and is not willing to waste it with an unessential meeting (47:53). Further, even when communication is necessary the meeting leader needs to consider whether the timing is right and whether formal meeting alternatives exist (71:2).

When to Have Meetings. There is plenty of guidance available to assist the meeting leader in deciding when to have meetings. However, before explaining the guidance, it is important to remember that the decision to hold a meeting is a choice on the part of the leader (26:5). Every meeting held is a result of someone making a conscious decision to have a meeting. Therefore, organizational meetings should take place only when the meeting leader desires group interaction of some form. The first piece of guidance is that meetings can be effective for transmitting information, especially standardized information as in training meetings or staff meetings (67:27; 71:2). While some argue meetings should not occur for the sole purpose of having a weekly meeting to transfer information, there are others who believe it is proper (9:5; 75:294). Those who believe weekly meetings are acceptable base their opinion on the presumption that meetings are effective at accomplishing secondary objectives as well as primary objectives, such as face time between supervisors and subordinates. With the complex organizational structures found today, it is increasingly difficult to actually communicate with key personnel. Thus, a meeting is one method to effectively transmit information.

Second, meetings assist in brainstorming and decision making (25:157; 67:27; 75:294). When a meeting leader is able to gather personnel to help develop ideas, solutions, and make decisions, he ensures that those personnel will be more enthusiastic and supportive of the outcome. Third, before introducing change, meetings can be held to discuss and modify the proposed changes prior to implementation (25:157; 67:27). Fourth, meetings provide a means for upward communication (67:27). Employees gain opportunities to ask questions and seek clarification through meetings. Fifth, meetings are effective for certain types of progress reports (71:2). By assembling different functional groups together, status reports can be discussed and coordinated. Finally, when effectively used, meetings can build a sense of team spirit (67:27; 71:2). People are motivated and encouraged by the teamwork that can result from quality and productive meetings (75:294). Throughout all of this discussion, it is important to maintain focus and ensure that meetings do not end up dealing with areas outside their responsibility (14:30). When held, meetings must maintain focus.

Meeting Alternatives. As important as when to hold meetings is the concept of when not to hold meetings. Alternatives to group meetings are as simple as sending a memorandum or using the telephone (26:13; 34:25; 40:14; 50:22; 67:28). Both of these methods can be as flexible as the initiator desires. For instance, memorandums can be one-way in

that they merely transmit information, or they can be two-way by requesting return comments back to the initiator. Telephone calls can be one-on-one, or they can be group conference calls. In particular, telephone calls work well when conveying routine information that is both likely to be easily understood and reasonably accepted (80:15). Other alternatives include electronic mail messages, voice mail messages, and the combination of similar meetings (41:124; 52:25; 75:294). With the rapid gains in technology new avenues for communication are appearing constantly and the diligent meeting leader will keep abreast of such alternatives. Finally, a meeting should never take place when the subject is trivial or when the meeting leader has already made up his mind (25:158). In these situations it is not only a waste of the participants' time, but also an insult.

If the meeting leader does determine that a meeting is the best way to handle a situation, then the leader must have a definite goal or purpose for the meeting.

#### Pre-meeting Administration

After the first level preparation is complete and a meeting is definitely going to take place, there are five administrative factors to address. Beginning with a detailed purpose for the meeting, the leader must transform the purpose into a plan. An agenda is the appropriate instrument for documenting the purpose as well as a plan of the events. Additionally, the leader needs to decide upon a time for the

meeting, how long it will last, and where the meeting will convene. Finally, the meeting leader must decide who needs to attend the meeting in order to satisfy the objectives.

Purpose. The meeting leader should ask himself, "What do I want to accomplish?" (80:17). Having a specific purpose and identifiable objectives for each meeting is the first administrative step to success. If a meeting does not have an important and specific purpose, the meeting dissolves into a social activity (30:21; 67:27). Since the purpose is usually fairly broad (disseminate information, initiate action, make decisions, motivate employees), the objectives should narrow the focus to identifiable and concrete actions (65:51; 76:68). Further, the objectives should be specific and result oriented. For example, establishing a revised format for requesting training funds could be a specific objective under the general purpose of improving training. After the meeting leader identifies the purpose and objectives, the leader must decide what constitutes completion (61:21). Is the meeting complete when everyone agrees that a problem exists, or is it complete when an agreeable solution is found?

The next action for the meeting leader is to write the purpose statement, preferably in ten words or less (54:10). This forces the meeting leader to further clarify his thinking. When writing the problem statement, the meeting leader should make it clear and direct because the leader will begin the meeting by concisely stating the purpose. During the meeting,

the leader may even go as far as to display the purpose statement for those in attendance (29:19; 45:11; 59:10). Such an action would direct and focus the participants on the relevant issues, rather than having them wonder exactly why they are gathered.

It is relevant to consider that every meeting sends a message to both those involved and to others in the organization. The leader can let participants know that they are important by following this simple rule: when the stated purpose is met, conclude the meeting (29:20; 47:53). It is an easy rule to follow and serves the objective of helping the leader achieve the best efforts of those involved in any future meetings. Likewise, it is amazing to see the excitement level of those leaving a meeting where they just efficiently accomplished their purpose.

Agenda. Having determined the purpose of the meeting and the specific objectives to accomplish, the meeting leader is ready to prepare the agenda. In order to avoid the major cause of wasted time in meetings -- lack of planning -- the leader needs to ensure the agenda is properly thought through, prepared, and circulated in advance (15:12; 47:53; 67:28; 69:8). The purpose of the agenda is to provide direction for the meeting and to set forth the desired objectives previously conceived by the leader. Viewing the agenda as a planning, organizing, and effectiveness instrument rather than as a mere description of the meeting is the more accurate approach

(11:15). Different avenues are available for the leader when planning the agenda, and one method is to request agenda items from individuals at the end of a previous meeting. Another method is to ask for issues from those who will be participating in a specific upcoming meeting (8:43; 61:21). When this is not practical or appropriate, the leader should simply brainstorm topic areas and then arrange the items in a logical fashion. By placing emergency and more difficult items first in the agenda, the leader can work to resolve them up front before spending time on less important issues (8:43; 50:24; 61:22). However, during the meeting the leader must keep an eye on both the clock and the agenda to make sure the meeting does not bog down during discussion of the important issues.

To ensure all participants are clearly informed, each meeting agenda needs to clearly include the date, time (starting and ending), location, summary of topics, purpose, objectives, and who will attend (71:5; 75:294). By placing this information in the agenda participants are informed of what issues will arise, and therefore, what preparation is required of them (14:29; 15:12; 67:28). In addition, this information ensures that everyone has the same understanding of the meeting and what will take place. When attendees can prepare in advance and bring any necessary support materials, the group can resolve issues quickly. Participants also learn of the order in which various topics will be discussed, and sometimes, the time limits for each item. Some experienced meeting leaders believe it is

wise to include time estimates for each agenda item as a means to keep people focused and on target (40:14). However, each meeting leader needs to make their own determination of what information needs to be on their agenda based on the specific circumstances; the elements listed above serve as a good reference point (30:22; 50:24). Just because a meeting pops up due to an emergency does not mean an agenda is not necessary. Quite the contrary, even emergency meetings need agendas, which can be conceived quickly on a piece of paper (22:1). In this manner, participants still know the purpose, topic order, and are able to better participate meaningfully.

In order to give participants adequate notice and preparation time, it is a good idea to distribute the agenda at least one full day in advance and preferably a week in advance of the meeting (15:12; 25:201; 46:55; 64:70; 71:5). As the meeting begins, the leader should project a visual of the agenda on an overhead and orally preview the items to further establish the relevance of the meeting and the order discussion will take place (52:26; 69:8). In addition, it can be helpful for the leader to further state that the meeting will abide by the times listed in order to respect everyone's busy schedule (3:36). This serves to clearly set the ground rules for even the most inattentive participant.

Meeting Length. To help in determining the length of a meeting, the meeting leader should stay away from impossibly tight schedules, yet avoid inflating the time needed. In

addition, studies show that meetings that extend beyond an hour tend to become inefficient and wasteful (45:11; 73:121). As people sit in one position without activity, they become tired and often impatient. These two attributes do not help meetings to succeed. Also, the number of participants plays a factor in determining the length. If there are few members, it is easier to keep everyone involved so the meeting can last longer. With large groups, people quickly become bored and distracted so the meeting should be as short as possible (71:4). Meeting leaders should also be aware of Parkinson's Law, which holds that work expands to fill the available time (47:53; 67:28). Related to Parkinson's Law is the idea that people can discuss items all day long without ever being productive (39:73). Therefore, the meeting leader should be critical and objective when determining the meeting length. Regarding routine meetings (which should be the exception and only used minimally), they should take place at pre-determined times to allow all participants ease in scheduling other activities (67:28).

Picking the time of day to hold the meeting can be a strategic effort all by itself. For example, holding the meeting just before either lunch or quitting time provides a powerful incentive for participants to remain focused and on task (40:14; 64:70). Some experts propose having meetings over breakfast, lunch, or after five to ensure attentiveness and brevity (5:40; 50:23). However, this is a very fine line because meeting leaders should be sure to avoid scheduling

meetings that infringe on the personal time of participants (4:20). If participants feel their personal time is being needlessly used, their attitudes may take a serious turn for the worse. Finally, if at all possible, end meetings on time or even early (18:16; 47:53). To do this, the leader should enlist the assistance of the agenda to keep people on track.

Meeting Location and Arrangement. Once the agenda is thought through and the optimal meeting time is established, the meeting leader must address the meeting location. Important factors to keep in mind are the size, comfort, seating arrangement, and room configuration of the locale. To begin, the meeting leader should scope out the site in advance to verify the location fits the specific needs of the group (19:58). For example, if the group needs white boards, the room should either be equipped already or there must be portable boards available. The leader should choose a room of the proper size to avoid having the group cramped for space or swimming in space (4:20; 71:6; 75:295). In addition, everyone should fit with reasonable personal space of their own. Thus, the size of the group should dictate the room.

An additional consideration when picking a room is to try to avoid scheduling meetings in rooms that are too comfortable, but yet avoid making participants uncomfortable (40:14; 45:10; 67:29). When participants are too comfortable they are prone to linger and waste time. On the other hand, when participants are uncomfortable they are in a good mental state and willing to be

active members. However, rooms that are too cold or too hot are never appropriate, nor are rooms with inadequate lighting (28:26). Remember, the purpose of the meeting is to discuss problems or find solutions and not to take a break from a hectic day. Figure 2.1 highlights the above considerations when picking a room in which to meet.

1. Does it have, or can it be equipped with, the proper equipment?
2. Is it of the appropriate size?
3. Is the room not too comfortable to discourage inefficiency?
4. How is the temperature -- too hot or too cold?
5. Is the lighting adequate to prevent people from drifting to sleep?

Figure 2.1. Room Considerations

To ensure attendees stay focused, some organizations hold stand-up meetings. Stand-up meetings are best as an alternative to frequent and long lasting traditional meetings. In stand-up meetings all attendees stand except for the meeting leader and the note taker (57:185). They should rarely last for more than 30 minutes and the meeting style helps ensure they are brief; if an attendee becomes long winded, the remainder of the group displays strong non-verbal cues for that person to stop. Unfortunately, stand-up meetings are ineffective when participants are tired.

When choosing the seating arrangement, there is disagreement as to where the meeting leader should sit. Some believe the leader should sit at the head of the table while others believe the leader should sit at the center focus position (31:68; 67:29). Differences in opinion primarily revolve around the participative level the leader is trying to achieve. Whatever the seating arrangement, the meeting leader should not allow empty seats between individuals; getting everyone close together encourages information exchange (61:26). The room configuration should be such that distractions remain at a minimum. In this manner, the meeting leader should never hold meetings in heavy traffic areas and also ensure that the room has a door that can be closed (4:20; 15:13). Traditional table arrangements use a rectangular table or a circular table. As with the seating position of the meeting leader, the table shape used depends upon the desired information flow of the leader (23:34; 25:189). Rectangular tables suggest information flowing from the manager, while circular tables suggest cross flow between all members. Regardless of the table and seating arrangement, the room should be of proper size and space, and it should fit the communicative desires of the leader.

Participants. An additional critical element in pre-meeting planning concerns the issue of not only who should attend the meeting but also how many should attend. Beginning with the selection of attendees, the meeting leader should invite only individuals who have a reason to attend (15:12;

46:55). By asking the question, "Who must attend in order to accomplish the meeting's specific purpose?" the leader can initially eliminate many individuals from consideration (30:21). To answer such a question the meeting leader should understand the type of meeting that is going to take place -- information, action, decision, or motivation. Further, the meeting leader should consider what each participant can learn from or contribute to the meeting (67:28). For example, the leader should invite those who have the authority to make decisions, those who will carry out the decisions, those who are affected by the situation, and those who need to learn about the meeting subject (25:171; 71:4). Inviting others merely wastes their time. In addition, having people present in a meeting where they are not necessary hurts morale and creates a potentially disruptive presence. Finally, the meeting leader should avoid at all costs the protocol invitees -- those who have traditionally attended a certain type of meeting (65:51). If such individuals do not contribute to the meeting's effectiveness, there is no reason why they should be occupying space in the meeting.

Regarding group size, the general rule is that meetings are more efficient when the number of participants is small. This rule is partly due to group dynamics (67:29). As the size of a group increases, individual members become less willing to participate and the likelihood of reaching agreement decreases. Trust and openness are also at their highest when the group is

small because participants believe their mutual interests are more likely to be considered (27:15). Additionally, a large group will tend to break into factions. Moreover, if too many people attend, the group wastes time explaining background information, has difficulty progressing through the agenda, and misunderstandings are more likely to occur (15:12; 27:15). As for the influence of the meeting leader, the leader will carry greater influence with a small group than with a large group. With the above considerations in mind, most experts believe the optimal group size is approximately six participants for a problem solving or planning meeting, 20 to 30 participants for a training meeting, and as many as can comfortably attend for a news or informational meeting (67:29; 71:4).

#### Meeting Execution

With all of the pieces lying in place, it is time for the leader to actually conduct the meeting. This is where the leader can reap the benefits of all the earlier planning. However, the meeting does not end once the participants finish discussing the issues at hand. The leader must conclude the meeting properly and ensure minutes are drafted.

Conduct. After the meeting leader decides the specific purpose and objectives of the meeting, develops the agenda, chooses a room, and selects the participants, the leader is ready to conduct the meeting itself. The day before the meeting the leader should send a memorandum, or place a phone call, to attendees as a small reminder (50:23). In the general

course of conducting the meeting, it should begin on time even when members are not present (8:44; 9:5; 15:13; 18:16; 61:26). Therefore, the lesson is to never be late, especially as the meeting leader! This is as much a matter of professionalism as respect and helps to make use of all precious time. Also, beginning without late arrivals lets them know the leader is serious and is not willing to waste the time of others (55:157). To be even more effective, the leader should not stop to catch-up the late arrivals but let them be in the dark for a few minutes. Further, arrange the room so that late attendees are obvious. After opening with a statement of the meeting purpose and the specific objectives, the leader should next summarize background information on the subject as a means to get everyone started on the same foot and to avoid misunderstandings (75:295).

The method of presentation is one area where the informed meeting leader can make a difference. With the assistance of visual aids the leader increases the odds that members will retain key information. Studies by 3M show that with words alone 90% of the message is lost, while using visual aids as a part of normal verbal presentations increases retention by 50% (71:3). Apparently, visual aids are a secondary source of message transmittal that enable participants who are primarily visual learners to absorb information. After the leader presents the initial information, the leader should then call for discussion. The purpose of discussion is to arrive at a

select number of proposed solutions. After discussing the pros and cons of each solution, the group should strive for a consensus without relying on a group vote (69:9; 77:61). Group votes are not a good idea because some individuals end up being extremely dissatisfied with the outcome. Unfortunately, there are times when a majority vote or an autocratic decision is the only choice. Once a decision is made, the group should then outline the plans to implement the decision (46:55; 50:24; 67:29). However, in order to achieve the process above, the leader must nurture an atmosphere in which everyone feels at ease.

Getting the participation of those in attendance is the only way the meeting will succeed (4:20; 63:32). Because the meeting leader is only one spoke in the wheel, the other members must get involved and play an active role. One way of getting others involved is for the leader to make participants feel welcome and appreciated (18:16). Small courteous gestures and comments can work to break down even the most uncooperative person. Say "please," "thank you," and "you are welcome" (79:78). Openly comment about personal things such as birthdays, graduations, anniversaries, and promotions (60:114). These actions let people know they are important and respected.

The leader also needs to ask questions, remain positive, and listen attentively to the comments made (70:293). The meeting leader can facilitate involvement by encouraging the expression of ideas and feelings. This serves to free the flow

of thoughts and to generate higher quality suggestions (28:18; 43:142). Another method of fostering the necessary atmosphere is to cover only one subject at a time and not allow interruptions while someone is speaking (10:73; 38:15; 40:14; 56:24). Each meeting member deserves the opportunity to state their opinions and ideas without being interrupted or beaten down by others.

Unfortunately, most meetings will have their own domineering member who must be kept under control (23:36; 66:60). While many meeting leaders find it difficult to retain control, it is absolutely imperative. Luckily, the group provides signs when a person is out of control. For instance, shifting of chairs, participants looking around the room, and side discussions are all signs of a member who has strayed too far away from the focus. An example of how to control meeting bullies is to jump in while they are taking a breath and say, "That's very interesting, now lets relate that back to the agenda" (32:83). Another method is to take the domineering member aside at a break and let them clearly know that distracting the group from the purpose is unacceptable (33:8). At the same time, the meeting leader should not let attendees monopolize the meeting with their own personal soliloquies, nor stray from the purpose and agenda (4:20; 8:59; 46:56; 73:119).

If discussion of one agenda item drags and the item does not require an immediate decision, the leader should move to the next item (15:13; 52:26). The point behind this action is to

keep things flowing or risk losing the attention of participants. If discussion happens to stall, the leader needs to get people re-focused and moving forward (12:20; 16:36; 28:20). Sometimes a simple five minute stretch break can clear away the cobwebs and refresh participants sufficiently to proceed further. In order to keep discussion moving, the leader needs to draw people into the discussion and insist that nobody sit and merely watch. Unfortunately, many managers settle for pseudo-participation, meaning that members are allowed to be passive and withdrawn (25:34). In addition to those members who monopolize the meeting and those who do not want to participate, meeting leaders should watch for members who have hidden agendas or who are waged in their own private competitions between each other (14:29). Simply pausing to look directly at such individuals, or restating the importance of the objectives, is a tactic the leader can employ in these situations.

A major facet of Total Quality Management is the feeling of ownership. The leader can foster quality in meetings by helping attendees feel the meeting is their meeting. The result of such action is that attendees will develop ownership and everyone involved will put forth a better effort (9:5). One method of developing ownership is by eliminating fear of ridicule and intimidation. In such an environment participants are more likely to open up and contribute meaningful comments. This by no means implies that disagreement cannot occur, and to the contrary, disagreement can be quite healthy (67:29). It

simply means that a constructive and supportive environment should exist. However, if discussion turns to direct attacks on individuals, the leader must stop the meeting and make it clearly known that the group will not tolerate such actions (12:25; 18:16). Fortunately for the leader who is trying to conduct a quality meeting there are indicators of the attitudes of participants and they are found in non-verbal expressions. The meeting leader should look for facial cues, body movement, and listen to voice tone to gauge attitudes (37:46). By constantly monitoring non-verbal channels, the leader can navigate group discussion in different directions depending on the circumstances and need.

When the meeting purpose is accomplished, or when the stated ending time arrives, the leader should adjourn the meeting (48:115). Just before the participants prepare to leave the room, the leader should be sure to summarize the important points covered as well as important conclusions and recommendations (58:26). Letting participants make short final comments before leaving is one more way the leader can encourage participation and end the meeting on a positive note. Further, just because a meeting takes place at work does not mean it cannot be light-hearted and constructive. A noisy, alive, fun, supportive, and hard-thinking group is an indicator of a meeting being conducted properly (27:10; 68:72; 71:4). Because each meeting takes on its own personality, just as people do, the leader should work to make the meeting memorable and productive.

Finally, there is the topic of when to let people leave early. As a general rule, when a point in the meeting occurs where participants are no longer involved or needed, the meeting leader should let them go get back to their own work (58:26). This philosophy is really a form of insurance. Letting members leave once they have fulfilled their purpose helps to ensure that such members will be willing to participate in the future.

Wrap-Up. As stated previously, the last few minutes of every meeting should be spent concluding any open issues. To prevent misunderstandings, it is important to restate all decisions, assignments, and deadlines agreed to during the meeting (36:167; 42:77; 67:30). Further, the leader must conclusively summarize how the meeting was useful, the achieved objectives, the steps or actions still open, and the person responsible for the actions (80:43). This ensures that everyone walks away with the same impression of what took place and what was decided. If it is necessary, the leader should break up assignments between two or more people. Fixing accountability in this setting will assist in easier follow-up down the road (3:39). A helpful tool to clearly re-cap the meeting events, assignments, and decisions are the meeting minutes, and every meeting should have them to some level of detail.

Minutes. Minutes are applicable to both large and small meetings and serve the purpose of keeping the group from having the same meeting more than once, or covering the same material more than once (44:93). Meetings require minutes for a variety

of purposes. First, they serve as a clear record of what transpired (52:26; 65:54). Second, they allow participants a tool to examine the assigned action items. Third, they assist the leader in follow-up. Fourth, minutes allow members not in attendance a means to remain in contact with the activities of the group (22:2; 69:8). Fifth, the minutes become a record to conclude issues, or instead they can serve as the framework for follow-on meetings (44:95). Before the meeting actually occurs, the leader should attempt to draft a skeleton copy of the minutes (44:93; 67:29-30). In this manner, the task of performing the minutes will be easier and only require individual comments and decisions sketched within the skeletal draft.

Minutes are not expected to restate everything said during the meeting. Instead, they should contain only the actions taken or decisions made (44:93). For example, an agenda item that a group spends 20 minutes on may only need two or three sentences of coverage in the minutes. Were minutes to restate everything said in the meeting they would be a meeting transcript, which is not the point. Also, nobody would ever use them as a tool for follow-up and tracking if they were too cumbersome. A simple way to take minutes is to have one person write notes beside each agenda item on the agenda itself (44:94). Another method is to use a flip chart and have an assigned recorder document ideas and decisions as they occur (64:71). At the very minimum the minutes should cover the

assigned action items and include the person's name assigned to the action, what action is necessary, and when the action is due (3:39; 58:26; 61:24). There should be no possible way to mistake responsibility for items because the minutes clearly state all responsibilities. Also, a listing of those in attendance can prove beneficial to prevent members from claiming ignorance to decisions or actions for which they are responsible (49; 65:55).

Special care should be used to word decisions exactly as the group makes them to avoid ambiguity. For instance, when the recorder phrases decisions with their own summarization it may be confusing when participants remember the decision in a different light. In addition, the minutes should be concise, organized and detailed enough to document the proceedings. Further, if at all possible, distribute the minutes within 24 to 48 hours after the conclusion of the meeting to all participants (8:44; 40:15). Finally, minutes are important to the group psychologically; they provide positive feedback so that participants can see their meeting time was spent productively (44:95; 63:32).

#### Post-meeting Evaluation and Follow-up

Since meetings are a process and all processes can stand improvement, each meeting needs evaluation upon its conclusion. The leader should look for ways to make the meeting more efficient and effective. Separate from the evaluation, the meeting leader also needs to ensure that follow-up action items

are reviewed and closed. If action items remain open and never resolved, the meeting essentially served no purpose.

Evaluation. Post-meeting evaluation is an important step towards improvement. It is necessary to critique each meeting for strengths, weaknesses, and areas for improvement (67:30; 76:69). The meeting leader has a variety of ways to accomplish this, including self critique, but one of the best methods is to prepare a questionnaire that each member fills out after the meeting (40:14; 75:296). In this manner the leader can ask for suggestions and comments in specific areas of meeting management and receive quick feedback. Another avenue open to the leader is to verbally ask for comments at the end of a meeting (61:25). Simply asking for one positive and one negative critique from each person can provide useful information. However, when using this method, the meeting leader must ensure participants realize their comments will not be used against them. Instead, the leader needs to transform the critique into a critique of the group itself and not any one person. A final method of feedback is requiring a written report or memorandum from select participants (72:36). Unfortunately, this method seems to place an unwanted burden on some members and results in less helpful feedback. As a result, the leader could expect attitudes to decline with the use of such a method. However, it does not matter how well the meeting was conducted if the actions assigned from the meeting do not occur; the meeting leader must ensure follow-up takes place on assigned action items.

Follow-Up. Because the effectiveness of any meeting is in direct proportion to the overall control maintained by the leader, allowing action item follow-up to slip through the cracks destroys effectiveness (15:19). If assigned actions from meetings are not followed-up on, the decisions and proceedings of meetings are worthless. Therefore, the meeting leader should insist on progress reports and should enforce deadlines established in the meeting forum (40:15). An even better approach is to have the action official report back to the group at a specified date (44:95). For some people such peer accountability can be stronger than accountability to a supervisor. When this is the case, the meeting leader should take advantage of the situation. However, if valuable meeting time is spent on follow-up reports, meetings will tend to last longer than necessary. Therefore, the leader must make a decision each and every time as to the best method of conducting follow-up.

#### Conclusion

This chapter reviewed the relevant literature on the principles of effective meeting management. As discussed, the majority of meetings are not successful because the meeting leader either does not possess the skills to lead an effective meeting or does not prepare properly. However, the impacts to the organization are too strong to allow unproductive meetings. The costs in direct salary expense, impact on attitudes, and time necessitate that leaders improve their meeting management

skills. To this end, the reviewed literature provides the foundation for answering the research questions, and specifically, the development of a comprehensive meeting guide. With an awareness of the importance of meeting planning, preparation, administration, conduct, conclusion, and skills, methodology is next discussed.

### III. Methodology

#### Introduction

Through the literature of the previous chapter, it is apparent that knowing how to conduct efficient and productive meetings is important to organizations. The specific objective of this chapter is to discuss the research methodology used to accomplish the objectives of this research. The framework for conducting this study utilizes the Delphi technique and is divided into a distinct three step process.

#### Step One

The first step, which is represented in the second chapter, involved an extensive search of existing literature containing information on planning and conducting effective meetings. This search began with general information on conducting organizational meetings and matured into a specific search for the unique elements necessary for effective meetings. The principal sources and methods are discussed below.

Literature Collection. Essentially, an archival review of past literature was conducted to obtain all relevant materials on the subject. The majority of information was found in a variety of trade magazines and specialty books, though an attempt was made to find direct research studies in professional journals (academia). Unfortunately, there is very little written in professional journals regarding how to improve

meeting effectiveness other than through the use of group decision support systems. Since the purpose of this research is to determine the essential elements of effective meetings and to develop a guide incorporating the relevant information for use by a wide variety of individuals, all information related to group decision support systems was determined to be outside the scope of this effort. This decision was made because the vast majority of organizational meetings are held in facilities that do not have the necessary computer resources, nor do the majority of meetings even need the assistance of group decision support systems.

Requests for Corporate Meeting Guides. Because of the important role meetings have in all organizations, 90 Fortune 1,000 firms in a variety of industries (medical, technology, manufacturing, and service) were randomly selected and solicited for help. Firms were selected from the Fortune 1,000 listing (a listing of the 1,000 largest firms in America) due to the variety of industries and size variation of the listed firms (35:518). Further, listed firms have attained a level of success and have been recognized accordingly by appearing on the listing. Because the desire was to sample successful firms (they would be the most likely firms to have guidance on conducting meetings), a representative sample of Fortune 1,000 firms were chosen. Ninety firms were chosen from the Fortune 1,000 sample with the intent of coordinating with a reasonable number of firms. It was decided 90 firms was a reasonable

number and would provide the researcher with a quality representation of material available. Moreover, because contact with the Malcolm Baldridge winners would be made by telephone, the combination of 106 total companies contacted by letter and telephone was deemed adequate. The assumption was that a portion of these organizations would have, and be willing to share, internal guides, training courses, or procedures for running meetings. Further, this material could be analyzed in addition to the articles and books found through the traditional literature review.

As previously mentioned, in addition to the 90 Fortune 1,000 firms, 16 winners of the Malcolm Baldridge National Quality Award were also contacted for assistance. The Malcolm Baldridge Award is given to selected firms for national recognition of their quality achievements and, in return, winners agree to share their successful quality strategies with other U.S. organizations (35:518). Because the winners are noted for their leading-edge approach to management, training, and process quality, it was anticipated that they may have meeting guidance of their own that could be analyzed. A listing of the 90 Fortune 1,000 firms solicited is included in Appendix A while a listing of the 16 Malcolm Baldridge National Quality Award Winners contacted is in Appendix B.

Chapter Four will discuss the results of the requested company assistance for both of the above company groups.

### Step Two

During this second step the information gathered in step one was analyzed, filtered, and prioritized. The purpose of this analysis was to determine what information was truly essential for conducting effective and efficient organizational meetings. By screening available literature as to the frequency of appearance of material on various subjects it became readily apparent which areas of conducting meetings were more important than others. This information was then used to write a comprehensive and detailed preliminary meeting guide for the United States Air Force, which is included in Appendix C. The conclusions drawn that impact the content and style of the guide are based on this author's judgment and interpretation of the information gathered in step one.

### Step Three

Step three consisted of an implementation of the Delphi technique. The Delphi technique was chosen in order to obtain impartial and quality feedback on the guide written in step two. Further, responses gathered from this method were expected to contribute vastly toward improvements in the guide with the desired end result being a guide ready for use by Air Force managers. To further explain the Delphi technique it is necessary to discuss in detail a description of the technique, the use of experts, the Delphi process, and the implementation of the technique for this research.

Delphi Technique Description. The Delphi technique is a name that has been applied to a method of eliciting opinions with the object being the attainment of a group response from a panel of experts (13:3). Unfortunately, when dealing with a group of people and trying to come up with an agreement, there are several potential difficulties that may surface. One of these difficulties is that group opinion is likely to be influenced, if not determined, by the views of the dominant group member. A second difficulty is that group pressure often results in group members feeling obligated to compromise their individual views (20:3). The main advantage of the Delphi technique, and the reason it was selected for this research, is that it removes these two undesirable aspects of group interaction. Delphi attempts to improve the traditional panel or committee approach by subjecting the views of individual experts to criticism from each other in ways that avoid face-to-face confrontation, provides anonymity of opinion, and the advancement of arguments based on clear thought and reason (13:3).

The distinct characteristics associated with the Delphi technique begin with anonymity. The purpose of anonymity is to reduce the power held by the dominant individual in the group (20:3). Anonymity is carried out by eliciting separate and private written opinions from experts. For greater effect, the experts involved in the process should not even know who else is involved. The second characteristic of Delphi is that of

controlled feedback. A Delphi exercise will normally consist of several iterations where the results of the previous iteration are made known to the experts, normally in a summarized form (20:3). Because of its simplicity and effective results Delphi has been used for a wide variety of applications in business, education, science, medicine, and other areas (62:1).

The Delphi technique was chosen for this effort to assist in the improvement of the meeting guide for managers discussed in step two. As previously discussed, a goal of this research was to create a quality meeting guide, or manual, for use by managers in conducting effective organizational meetings. Using the information gleaned from the extensive literature review, the Delphi technique was deemed an excellent way to obtain feedback and ideas on how to further improve the guide and make it more impactful for managers.

Delphi Process. The typical Delphi exercise begins with the researcher submitting a questionnaire to experts that asks them for their opinions on a given topic (round one). This information is sent back to the researcher who summarizes the results. In round two the researcher then sends to the experts the results' summary and a request for the experts to reconsider and revise their comments if they feel it necessary (21:5). The experts then provide additional feedback and comments on the summarized results to the researcher. This iterative process can take place as many times as the researcher feels is necessary to achieve a quality product.

A main objective of this process is to allow the experts the individual opportunity to develop their own thoughts and ideas regarding the topic. When they are given the summary results from the first round, they then have the opportunity to rethink their opinions in light of what the other anonymous experts had to say. There is no pressure or control exerted in any manner, just the simple chance for the experts to approach the topic from another view. The usual end result from a Delphi exercise is expert feedback that over iterations tends to narrow in range and increase in accuracy (13:8; 21:37).

Use of Experts. The first step in the application of the Delphi technique is the selection of a group of experts. However, there is no centrally recognizable agreement of what constitutes an expert. Expertise is judged by status among peers, years of professional experience, appraisal of relative competence, and the amount of information the individual has access to (13:3). The inclusion of prestigious individuals as experts often acts to the detriment of the technique because it is usually the younger and more obscure members who are more highly motivated to work hard and provide more carefully considered responses. Thus, there is a continual choice between older, established professionals and younger, motivated professionals (62:33). The apparent solution is to include an entire spectrum of experts to assure diversified opinion. Further, the panelists do not have to be true experts in the field to achieve credible results, but only need to informed in

the area of inquiry. In fact, it has been shown in several studies that informed graduate students provide essentially the same results as experts (62:35-39). Therefore, the objective of any research using the Delphi technique is to organize a diverse panel of informed and experienced individuals to serve as experts.

Related to the question of who should be an expert is the question of how many experts. Unfortunately, there is no agreed upon number of experts necessary for effective results. Essentially the decision of how many experts are necessary depends on the complexity of the subject, the ability of the researcher to find people with subject knowledge, and the relative interest of the experts to participate in the effort. Studies by The RAND Corporation have shown that the effectiveness of groups with seven experts is not statistically far below that of 29 experts (21:11).

With the above considerations in mind, seven individuals were asked to participate as experts; the names, positions, companies and addresses of each expert are included in Appendix D. The people contacted represent banking, insurance, energy, defense contractors, education, and the Air Force. In addition, three of the participants are from firms who responded to this research effort by submitting their own corporate information on conducting meetings. Taken as a group, they represent a wide variety of experience and expertise. Even more important, they

represent a willingness and desire to improve organizational meetings and assist in this effort.

Delphi Implementation.

Round One. Having already gained agreement from seven experts to participate in this effort, each expert was mailed or hand delivered a Delphi packet on 28 February 1995. Each packet included an introductory letter explaining the Delphi Technique, a draft meeting guide, and a Delphi Inquiry form (Appendix E). The five experts living outside the local area had their round one packets mailed to them while the other two experts located at Wright-Patterson Air Force Base had their packets hand-delivered. The purpose of the eight question Delphi Inquiry form was to focus the experts' feedback of the meeting guide to specific areas. Control numbers were placed on each Inquiry form so that if any of the experts did not return their forms, it would be simple to identify who to contact.

All of the Inquiry forms were returned and the results were compiled into a summary by question number from the first Inquiry (Appendix F). Two of the experts were late in returning their Inquiry forms and had to be reminded several times; as a result, all inquiries were not received by the researcher until 30 March 1995 (see Figure 3.1).

Round Two. In the second round each expert was again mailed or hand-delivered an introductory letter on 5 April 1995 explaining the purpose of the research and the tasks required of the expert for the current round. Had an expert not responded

to the first round, that expert would not have been involved in the second round. In round two, the experts were asked to review the round one feedback summary, which was attached, and to complete a second Delphi Inquiry form. The second Inquiry form focused on having the experts identify those comments from the first round feedback summary that they both agreed and disagreed with. In addition, the experts were asked to identify which changes to the draft meeting guide were most important to make it effective. Both the second letter and Inquiry form can be found in Appendix G. Once again, control numbers were placed on each Inquiry form so that if any of the experts did not return their forms, it would be easy to determine who to contact.

Only four of the seven experts returned their second round Inquiry forms within the requested time frame as shown in Figure 3.1. The fifth expert's Inquiry arrived nine days late and the sixth's arrived 17 days late. Unfortunately, on 10 May 1995 the seventh expert explained that he would be unable to return the second round Inquiry form due to pressing work commitments.

The feedback compiled from the second round was used to improve the draft meeting guide in Appendix C. The comments from experts were evaluated as to their relevance, appropriateness, and congruence with the goals of the meeting guide itself. As a result, many suggestions were incorporated into the final guide.

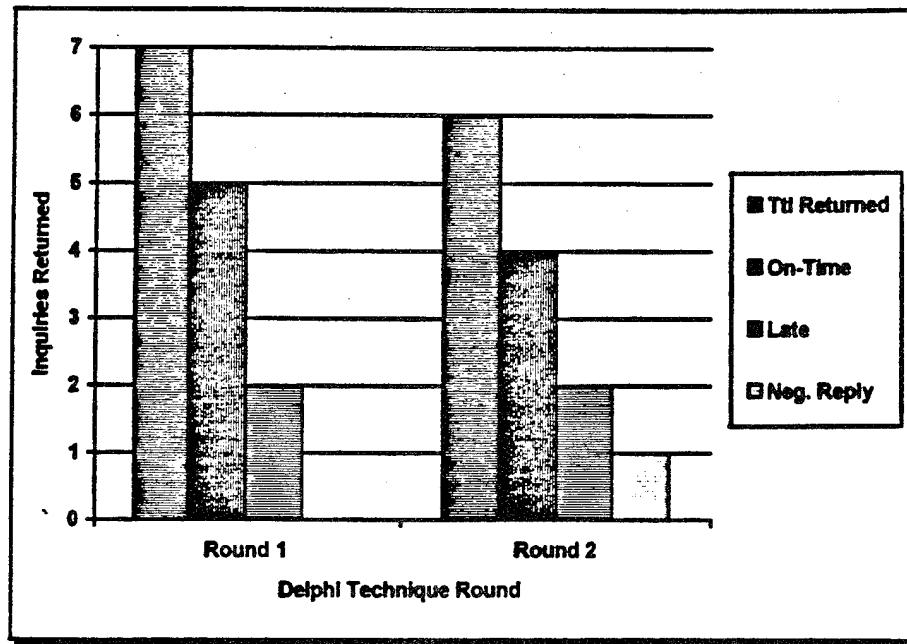


Figure 3.1. Delphi Inquiry Returns

#### Conclusion

This chapter described the methodology used in collecting and analyzing the information required to answer the research questions and to fulfill the research objective. Of specific interest was the discussion of how the information was gathered, an explanation of the Delphi technique, and the implementation of the Delphi technique. The next chapter presents the results of the analyses.

#### IV. Results and Analysis

##### Introduction

The purpose of this chapter is to interpret the information gathered, to present the analysis of the information, and to address each research question. This is done by first interpreting the reviewed literature as it applies to the problem statement presented in the first chapter. Second, the results from the requested corporate assistance on in-house meeting training guides are presented. Third, the results from the Delphi research are discussed. Fourth, the final version of the comprehensive meeting guide, which is the main result of this research, and can be found in Appendix I, is written. Finally, each research question is addressed.

##### Literature Review and The Problem Statement

The problem statement in the first chapter addressed the need for all American organizations to quit wasting time through poorly run meetings and take an active stance on curbing such inefficiency. The tool presented is that of an organizational guide on how to properly conduct meetings to ensure effectiveness, productivity, and efficiency. As testimony of the need for such a guide, throughout the literature review countless sources identified the incredible waste of resources that result from unproductive and inefficient organizational meetings. Unfortunately, the quantity of meetings in the

majority of workplaces is not decreasing, but increasing. The resulting drain on American organizational productivity is truly staggering, and the following quote was chosen to help quantify the effect. "One carefully costed-out analysis of a mid-size Fortune 500 company yielded a conservative estimate that this business lost 71 million dollars a year because of ineffective meeting management!" (55:4).

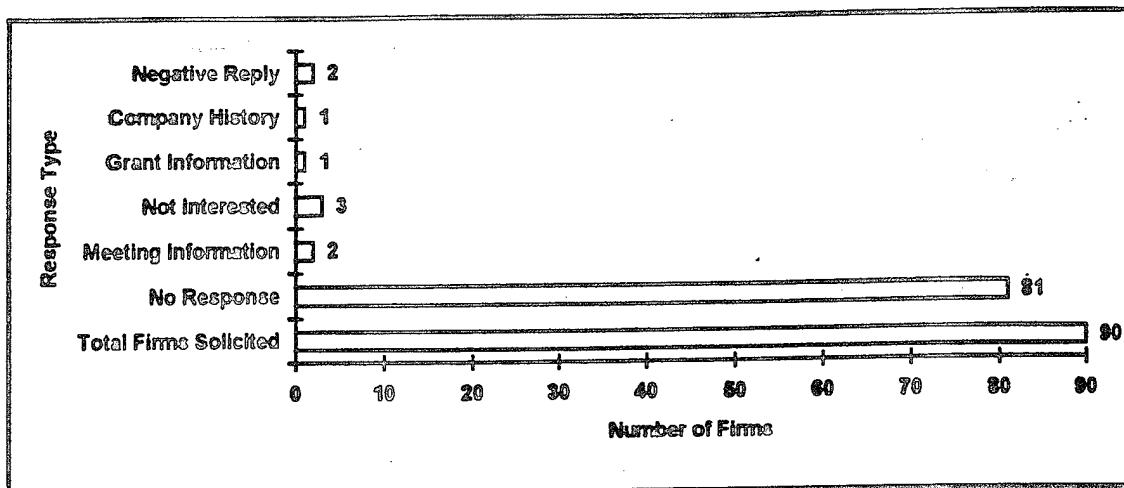
It is abundantly clear that we have a problem that is large, growing, and must be resolved to keep America competitive and a world leader. This does not just apply to the business sector, but also the Department of Defense. There are few areas in our society that demand the level of quick decision-making responsibility experienced in the military. In this environment lives are at stake, and ultimately, the security of this nation. Importantly, it is the decisions made regarding which weapon systems to procure, which logistical models to follow, and which strategies are best to adopt that determine our fate. However, few realize that these large scale decisions are simply the aggregation of thousands of smaller day-to-day decisions on the part of junior and mid-level leaders. It is in this arena that effective and productive meetings are critical for the operation and success of the military.

The good news is that each one of us possesses the capability to fix the enormous meeting problem in our own area of influence. As success is achieved, as people see the impacts, and as a new generation of personnel are trained

through observation, the tide can turn. All that is needed for this to happen is for people to receive some form of training. As repeatedly stated throughout this thesis, the primary objective is to write a guide to fill the existing gap.

#### Corporate Data Gathering

Unfortunately, of the 90 Fortune 1,000 companies contacted for assistance on this thesis, only two responded with information -- Utica National Insurance Group and Commonwealth-Edison. Of the remaining 88 corporations, three replied with letters stating they were not interested (Amway, Immunex, and Nike). One other firm sent their guidelines for requesting grants (The Cargill Foundation). In addition, one company sent copies of their company history and relevant facts with a letter stating they did not have adequate resources to respond to my request (American Airlines). Finally, two other firms called and relayed that they did not have any internal meeting guides or training courses (Coca Cola and NationsBank). Thus, 81 firms did not respond in any manner. In retrospect, one can surmize that more than 90 Fortune 1,000 firms should have been solicited in this effort. However, there is no guarantee that with 150 firms, or even 200, that the results would have been much different. The results of the 90 Fortune 1,000 firms solicited is represented graphically in Figure 4.1.



**Figure 4.1. Results of Fortune 1,000 Firms Solicited**

Utica National Insurance Group sent a copy of their Guidelines for Leading Meetings. Some of the items covered in the guidelines include a description of what a meeting is, what the various purposes of meetings are, a cost analysis breakdown of approximating manpower costs for meetings, how to select participants, and how to plan for meetings. In total, the guide consists of 12 outlined pages to assist associates in planning and conducting organizational meetings (74).

Commonwealth-Edison responded by sending copies of The Meeting Planner and Conducting Meetings: Participant Manual, both developed by Commonwealth-Edison. The Meeting Planner is a 16 page manual that presents a nine step approach to planning meetings. Included in the document are worksheets for a prospective meeting leader to complete in the meeting planning process. Further, there is a comprehensive discussion of how best to use audiovisual aids in meetings. Conducting Meetings

is a 130 page training guide that both presents information relevant to conducting meetings and includes training activities to reinforce the presented material. This two-step manual is quite comprehensive as a training guide and the content of the exercises lead me to believe the manual very application oriented (24).

During late 1994, the Malcolm Baldridge Quality Award winners through 1992 were contacted by telephone and asked to provide assistance in the form of corporate guides and manuals for conducting meetings (see Appendix B for a listing of winners). Winners for 1993 were not contacted because it was determined that interest in the Malcolm Baldridge Quality Award had begun to wane; the number of applications declined by over 28% between 1991 and 1993 (35:518).

General Motors, the Cadillac Motor Car Company, responded that they were unable to provide such information to outside organizations. However, they did send a copy of their corporate training catalog that included two specific courses on conducting small group meetings that non-GM personnel can attend at a cost of \$210 and \$360 each. Similarly, AT&T stated that they were unable to give internal manuals to outside organizations but did imply that they have such a meeting guide for the use of their associates.

A third firm, Milliken & Company, makes use of training manuals purchased from a company by the name of Development Dimensions. Development Dimensions was unwilling to provide any

samples of their materials regarding meeting effectiveness for free but were willing to sell materials to the Air Force. Finally, Texas Instruments did verify that they utilize manuals for training their employees on how to run better meetings. However, as with the others, they were not willing to divulge any information for free. They did send a copy of their Training and Education Catalog for 1994 that includes classes in conducting meetings. Texas Instruments hinted they are in the process of developing themselves as consultants for other companies when it comes to complete management operations, including meetings.

As a summary, none of the four Malcolm Baldridge Quality Award winning firms who make use of meeting training guides were willing to share them with the Air Force. However, two firms (General Motors and Texas Instruments) would allow Air Force employees to attend formalized training courses for a fee. The remaining 12 Malcolm Baldridge Quality Award winners did not have guides or manuals on how to conduct meetings.

#### Delphi Research Results

Seven experts hailing from corporate America, military contractors, and the United States Air Force participated in a review of the draft meeting guide. A two round Delphi process was used to solicit feedback on the draft meeting guide, and then to later refine the initial feedback. The first round consisted of providing the seven experts copies of the draft meeting guide found in Appendix C and asking them to complete

the Delphi inquiry found in Appendix E. Feedback from the experts' inquiries was compiled in a summary (Appendix F). The nine pages of feedback from round one can be quickly highlighted by showing the seven areas that received the most comments.

These seven general areas are listed in Figure 4.2.

1. The guide/author exhibited a sense of negativity towards meetings.
2. Downplay "getting noticed" as an individual benefit and come up with some other individual benefits.
3. Some sort of footnoting or references for where to get information on meetings is necessary.
4. Attachment worksheets -- both favorable and unfavorable.  
-- Some thought they were great while others thought they were unnecessary.
5. Author's use of personal opinion; "I".
6. Use of clip art and the method of incorporation in the text -- some felt clip art passe while others enjoyed it.
7. Use of gender references -- take them out.

Figure 4.2. Most Frequent Round One Feedback Areas

The second round began by providing the experts copies of the feedback summary from the first round and a second Delphi inquiry found in Appendix G. The feedback from this second round of expert inquiries was compiled in Appendix H.

The first question in the second Delphi inquiry asked the experts to identify the comments from the first inquiry that they most agreed with. Further, the question asked the experts to add any of their own thoughts related to the identified

comments. Of the 77 individual second round comments stated, which focused on 44 different first round comments, only 10 were accompanied by personal thoughts. As a result, it was virtually impossible to gain any depth of insight into the second round expert comments other than to understand the basic first round comments they agreed with. Interestingly enough, the second question of Inquiry two asked the experts to identify which first round comments they most disagreed with and the reason why. All of the 20 individual second round comments were accompanied by rationale.

Question four of Inquiry two asked if the experts changed their mind regarding any of their first round observations. Only four of the six inquiries returned addressed this question and all four replied there was no change of mind.

In summary, the five questions of Delphi Inquiry two resulted in 92 separate comments, some of which were contradictory, and can be found in Appendix H. The ideas expressed by the experts were used to improve the draft meeting guide and are reflected in the final guide (Appendix I). Listed in Figure 4.3 are specific expert comments incorporated into the guide showing the changes that directly resulted from the Delphi technique.

Q1F1	Q1F2	Q1F4	Q1F5
Q1F7	Q1F8	Q1F10	Q1F14
Q1F15	Q1F16	Q2F3	Q2F5
Q2F6	Q2F9	Q2F12	Q2F13
Q2F16	Q4F1	Q4F2	Q4F3
Q4F4	Q4F6	Q4F7	Q5F17
Q6F5	Q6F6	Q6F7	Q6F9
Q6F10	Q6F13	Q6F16	Q8F5

**Figure 4.3. Round One Comments Incorporated  
(Q1F1 = Question #1 Feedback #1)**

It is the unanimous opinion of the experts that with the changes found in the final guide the researcher has a quality tool to help improve organizational meetings.

Through both Delphi rounds the experts confirmed the need for improvement of organizational meetings as the review of the related literature suggested. In addition, most of the experts commented that a meeting guide is an effective method to improve meetings and that the draft guide prepared for this effort was a good one.

#### Meeting Guide

The culmination of this research is the completed guide on how to conduct effective and productive organizational meetings. This guide can be used by any organizational member no matter the size of the organization. While it is geared for the Air Force it is applicable to a wide range of corporations, non-profit agencies, and other government agencies. This detailed guide can be found in Appendix I.

### Research Questions

The three research questions posed in Chapter 1 will now be addressed.

Research Question 1. *What are the essential elements of effective meetings and how are they planned for and implemented?* The information gathered in reference to this question is quite clear and shows that there are several essential elements of effective meetings. First, it is important to establish the purpose and objectives of any proposed meeting. Once this foundational guidance is known, the individual desiring the meeting is in the position to decide if a meeting is the best way to achieve the purpose and objectives. Knowing that meetings are not the only way to gather information, provide training, relay policies, and make decisions provides managers with several attractive alternatives. Quite often the individual discovers that the purpose can be better achieved through another format, such as through a memorandum, by telephone, or via electronic mail.

Second, when a meeting is the best way to accomplish the objectives, managers need to plan for the meeting. Areas that need planning are the location, the time, the participants, and the layout of the facility. Each of these factors carries with it several subcategories that are discussed in detail in the meeting guide found in Appendix I. However, for the purpose of illustration, focus on the time of the meeting. This includes the start time and end time, and therefore, the duration of the

meeting. The duration is dependent upon the number of items to discuss and their complexity. The manager chooses the start and end times based upon the number and skills of those attending, and when they are most attentive, productive, and able to meet. All of these factors are then rolled into the development and advance distribution of a thorough agenda. The agenda serves as the meeting outline and gives all participants advanced knowledge of the meeting content and what is expected of them individually.

After the manager plans for the meeting, there is still the effort to conduct the meeting. This task begins with a reminder sent the day before to those who will attend. The leader begins each meeting with an overview of the purpose for the meeting and the agenda items to discuss. Moving from one item to the next the leader needs to ensure participants are given an opportunity to express their views in a non-hostile environment. This means the manager must deal with dominating members, non-participating members, and personality differences. Serving as both a member and facilitator, the leader must watch the clock and the agenda to conclude the meeting on time. To finish the meeting properly the leader needs to summarize agreed to items, assign responsibility to follow-on actions, and give each participant one last opportunity to state their views. Following the meeting, minutes must be drafted and distributed to those who were in attendance.

Finally, the last two essential elements for meeting success include post meeting evaluation and follow-up of action items. After each meeting some form of evaluation needs to take place. This is important to provide the meeting leader with necessary feedback so that each meeting can be an improvement over the last. There are several ways of obtaining quality evaluations and they are discussed in the meeting guide. As far as the follow-up of action items, this is necessary to ensure that the decisions and courses of action agreed to within the meeting are carried out. If they are not, the meeting served no true purpose and the organization is bound to never achieve its true objectives due to lack of execution.

The answer to research question 1 is summarized in Figure 4.4.

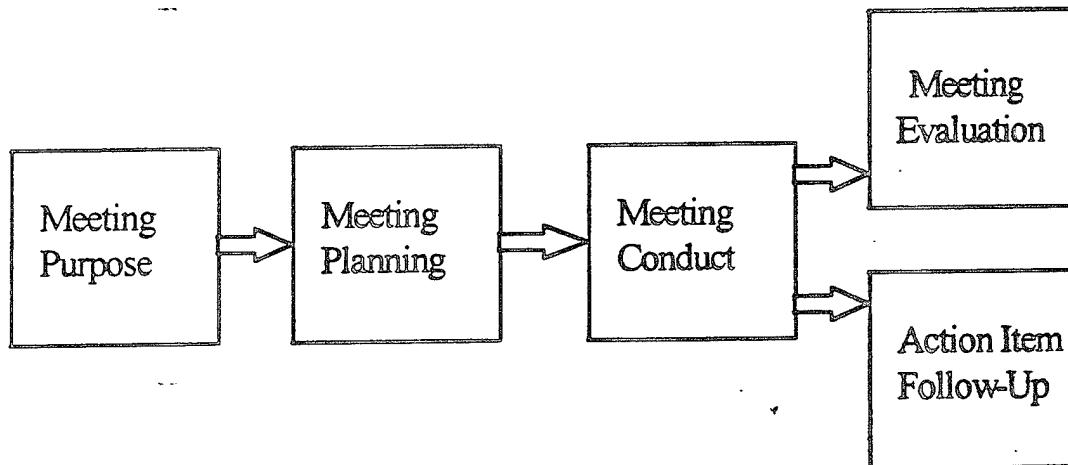


Figure 4.4. Key Meeting Management Areas

Research Question 2. What are the benefits that result from conducting productive meetings? The benefits that result from conducting productive meetings are three-fold. First, the

organization will make proper use of valuable assets -- people. As shown repeatedly in the literature review, managers spend a significant amount of time (up to 80%) in meetings. With much of this time being currently wasted, improvement in the productivity of organizational meetings will open up valuable time for organization leaders. Therefore, managers in turn can improve their own productivity and better see to organizational needs. In addition, the attitudes and morale of employees that are currently being broken from frustration at having their time wasted will improve.

The second benefit is that decisions and actions agreed upon in the meeting environment are a product of the group in attendance. In this manner, each participant has a voice in the outcome and a stake in the decision. Participants are far more likely to *buy-in* to concepts explored in the group meeting scenario than they are to edicts issued by senior management. Accordingly, when it comes time for implementation of tasks and decisions, the odds are greater that implementation will take place more wholeheartedly and effectively. By allowing members to share in the management process, the organization benefits from team work and a more unified front.

The third benefit from conducting productive meetings is on an individual level. Employees are able to demonstrate their capabilities in the meeting forum. An individual who can plan, prepare, and conduct an effective meeting brings attention to himself. This person receives positive notice by senior

managers, peers, and subordinates. The resulting perception of such a person is quite favorable and often leads to opportunities that would otherwise not be available. Therefore, possessing the knowledge and skills of productive meeting management will help to advance a person's career as well as improving the efficiency of the organization. It should be noted that pursuit of personal gain alone is not a valid reason for learning productive meeting management skills.

The answer to research question 2 is summarized in Figure 4.5.

1. Proper use of assets -- people.
2. Group involvement in decision making.
3. Demonstration of individual abilities.

Figure 4.5. Productive Meeting Benefits

Research Question 3. What information and skills are critical for meeting leaders to know and understand when conducting meetings? There are several skills critical for meeting leaders to know and understand when conducting meetings. Besides what has already been covered in the first two research questions, there are the issues of people, of commitment to improvement, and of risk taking.

To begin, people are the central point of any organization and the meeting leader must develop personnel management skills.

Without capable and qualified personnel no organization would be successful. Therefore, it is critical that the meeting leader treat those in attendance with respect and courtesy. Since they are valuable members and resources of the organization, take only as much of their time as absolutely necessary. This means that participants should be allowed to leave early from meetings when their presence is no longer necessary, and that all attempts should be made to keep meetings concise.

Next, meeting leaders must be committed to improvement in the way that they conduct meetings, and in the way that the organization culture expects meetings to be run. Thus, meeting leaders need to develop skills in the area of process improvement. This includes the personal initiative to study and use the tools available, including this meeting guide and other information sources. Essential to effective meeting execution are communication skills (verbal and non-verbal), organization skills, and management skills.

Finally, effective meeting leaders must be risk takers. They must be willing to deviate from the status quo in search of improvement and excellence. As strange as it may seem, those attempting to make changes in the name of improvement are sometimes treated with suspicion. People naturally are afraid of change and when one person is the champion of change, they are bound to meet resistance. The dedicated meeting leader must be prepared for resistance.

### Conclusion

This chapter discussed the information gathered through the literature review, the results of the request for corporate meeting manuals, and the results from the Delphi process used. First, the results of the literature review support the problem statement that organizations are inefficient when it comes to meeting effectiveness. Second, the response level from the companies solicited was quite small and leads one to believe that most organizations in America do not have any sort of meeting guide or meeting training manual. If this is true, there is a great need for such a tool. Third, the Delphi experts confirmed that there is a problem with organizational meetings and that a comprehensive meeting guide is one approach to solving the problem of poorly conducted meetings. In addition, the experts reviewed the guide for completeness and content. Fourth, the meeting guide was written and the research questions were addressed. The next chapter presents the conclusions of this research.

## V. Conclusions and Recommendations

### Introduction

The purpose of this chapter is to discuss the outcomes of the three research objectives outlined in the first chapter. As a part of this discussion, this chapter will address the conclusions drawn from the corresponding three research questions and the use of the Delphi technique. Further, recommendations are given for use of the results from this research. Finally, suggestions are made for future research related to this study.

### Research Objectives

The three research objectives posed in Chapter One are now addressed. In addition, the accompanying research questions, which are fully covered in Chapter Four, are discussed.

Research Objective A. Determine the essential elements of effective meetings. Before organizational meetings can be improved, one must understand the elements that comprise an effective meeting. Therefore, to find the answer to this objective research question one surfaced.

Research Question 1. What are the essential elements for effective meetings and how are they both implemented and planned for? Effective meetings do not occur by mere chance. Instead, effective meetings are the result of extensive pre-planning and thought on the part of the meeting leader. The

meeting leader begins this process by first identifying the purpose for holding the meeting and the objectives to accomplish. At this point the meeting leader must decide if a meeting is even necessary -- the objectives could be accomplished in another manner. If a meeting is the best way to accomplish the objectives, the next step is for the meeting leader to take care of the administrative details. This includes such items as establishing a start and end time for the meeting, choosing the participants, picking a location, preparing an agenda, and sending participants a meeting reminder.

The third step facing the meeting leader is the actual meeting itself. To conduct an effective meeting the leader must prepare. Preparation includes such areas as understanding the dynamics of the group, facilitating discussion, fostering individual involvement, and assigning action items. The fourth and last step involves evaluating the meeting and conducting follow-up on the action items assigned. It is important to continually improve the quality of organizational meetings and one of the best ways to do this is by evaluating each meeting. Further, action items must be tracked to ensure necessary activities take place.

Research Objective B. Determine what benefits accrue to both organizations and meeting leaders when meetings are productive. In order to motivate people it is helpful to understand and express the benefits they stand to gain.

Interestingly enough, this also applies to organizational entities. Thus, by understanding how both individuals and organizations benefit, the chances are greater that the essential meeting elements will be adopted. Research question two was formulated to help identify these benefits.

Research Question 2. *What are the benefits that result from conducting productive meetings?* In essence, there are three distinct benefits. The first benefit is that organizations will make better use of their people. Specifically, the amount of employee time wasted by the organization will decrease. Second, participant buy-in occurs on meeting decisions because participants have a voice in the outcome. This results in greater support and acceptance of decisions. Finally, the third benefit is that individuals leading meetings can use them as a forum to demonstrate their capabilities and readiness for increased responsibility.

Research Objective C. *Write a detailed and comprehensive meeting guide that can serve as a training manual on conducting efficient and effective meetings.* The culmination of this entire thesis research comes down to this single objective. The meeting guide is the capstone that brings everything else together into an application oriented and usable tool. To assist in fulfilling this objective the next research question was formed.

Research Question 3. *What information and skills are critical for meeting leaders to know and understand when*

conducting meetings? The first research question outlined the essential elements for effective meetings and the second detailed the motivational benefits. However, it is the third research question that fully takes into consideration the aspects of people, improvement, and risk taking. Organizational employees drive the organization towards its goals. Therefore, it is important for meeting leaders to understand how to properly treat associates and respect them. In a similar vein, organizations must continually strive for improvement or face stagnation and decay. Meeting leaders need to understand the importance of continual improvement and infuse this principle into their meetings. Finally, it is with a certain degree of risk and uncertainty that the majority of important decisions are made. In order to mitigate the inherent uncertainties, meeting leaders must foster development and independence of meeting participants. By doing this, the meeting leader has a cadre of professionals that are capable of operating in such an environment.

#### Delphi Research Conclusions

The use of the Delphi technique provided the researcher access to the opinions of seven experts in the pursuit of answering the research objectives. The Delphi technique is an iterative process that allows the experts not only time to reflect on their inputs, but also the chance to visually see the feedback of the other experts. It is through this process that

the essential characteristics and elements of the meeting guide in Appendix I were refined.

The effectiveness of research using the Delphi technique is contingent on the cooperation of the experts. In this particular case, all seven experts cooperated greatly and gave several hours of their own personal time to make this research a success. Sadly, one expert was unable to participate in the second Delphi round due to pressing work obligations. It was with regret that he expressed his inability to complete the second inquiry and he stressed his desire to obtain a copy of the finished product. A lesson from this experience is that it is wise for the researcher to select only those experts that are committed to the project. In addition, using a manageable number of experts makes the researcher's job easier when following up on the Delphi inquiries.

A consistent comment from the experts was that efforts expended in the pursuit of improving effective meeting management are quite necessary. They uniformly agreed that meetings are an important tool of business and need improvement. As was hoped would happen in this research, several of the experts have taken hold of the meeting guide and implemented areas they feel to be most applicable to their organizations.

#### Recommendations

The results of this research have wide applicability to Air Force and commercial organizations. The study was intended to provide some insight into the subject of improving

organizational meetings as a basis for organizational improvement.

Because meetings are the primary tool of organizations to facilitate the flow of information and aid in the decision making process, the need for this research is not going to disappear. On the contrary, the need for improved organizational meetings is increasing as the Air Force is in a drawdown and is being forced to improve the efficiency of operations. Consequently, the results of this research, and the meeting management guide in particular, should be made available to Air Force leaders individually and through directed training.

Individual Access. Air Force leaders have always been held responsible, and expected, to further their professionalism on their own. This is traditionally done through such avenues as evening and weekend advanced education programs, Project Warrior materials in base libraries, and involvement with Toastmasters -- a public speaking group. One solution to improving meetings is to make effective meeting management literature available to Air Force members either through base libraries or the base quality office. Moreover, each large organization should have basic materials on meeting management for use by organizational members. However, for this approach to succeed, senior Air Force leaders must advocate the development of meeting management skills. Unfortunately, this senior level support is not going to occur until they realize

poorly conducted organizational meetings are a problem that can be fixed.

Group Access. A separate means of spreading the effective meeting management message is through group training. The Air Force currently provides training in areas such as how to write performance appraisals, how to be a supervisor, and how to complete injury reports, why not provide training on effective meeting management? A simple class taking anywhere from two to eight hours (depending on the desired level of instruction) would suffice and could be offered through the base quality office or education office. To make it even simpler, the course could be partially conducted through videotape and enhanced with live instructor training.

Beyond the practical techniques for improving organizational meetings there is a great potential for further research in this area to improve what this research began. Recommendations for future studies are set forth next.

#### Future Research

This study provides a framework for future research on the process of meeting management. A critical step in research is to implement the solution chosen to solve the problem at hand. In this case the problem is ineffective organizational meetings and the partial solution is the development of a meeting guide. The next phase of the research would naturally be to test the effectiveness of the guide in some manner. There are essentially two ways this could be done.

The first method to test the effectiveness of the guide would be to choose several organizations and evaluate the effectiveness and efficiency of their meetings. Members of the organization could then be provided copies of the guide and possibly be trained in meeting management techniques. The last step would be to again evaluate the chosen organization's meetings to see if there was any improvement in effectiveness and efficiency. This evaluation could be performed by the researcher using evaluation methods created through research. The second method to test and implement the guide would be to choose Air Force organizations and train select members on the precepts found in the meeting guide. This time, however, the evaluation could be performed by survey of meeting leaders and meeting participants both before and after implementation of the guide

The Delphi process of questioning resulted in a separate but related area of future research; the topic of presentation management. Public speaking and the giving of presentations are important skills required in the acquisition community and many other areas of business. While it is often taught in general terms, there is both room and the need for the Department of Defense professional to further these skills.

Finally, future researchers could narrow the scope of this research effort and focus on one or two aspects of meeting management to explore in detail. For example, addressing the

aspects of managing people and their input during meetings could be the subject of a whole separate study.

### Conclusion

This chapter discussed the conclusions drawn from this research effort. The fundamental impact and significance of this research is that a comprehensive and concise meeting management guide was developed to assist managers in organizations of any size to improve their organizational meetings. In addition, the lack of corporate meeting guide responses from both Fortune 1,000 and Malcolm Baldridge Quality Award winning firms supports the finding that the majority of firms in America do not provide training in meeting management. The result of this finding is that there needs to be a focused effort to train leaders in meeting management to improve the quality of organizational meetings.

Further, in this chapter the most significant answers to the research objectives and research questions were discussed. Moreover, recommendations for use of this research and suggestions for future related research were given. The researcher recognizes that the analysis does not end here. The ongoing work of many individuals will be required to ensure that a lasting and marked improvement in Air Force meeting management is made.

Appendix A: Listing of the 90 Fortune 1000 Firms Contacted and  
Their Addresses

Acustar, Inc. 1600 Webster Street Dayton, Ohio 45404-1205	American Airlines, Inc. Dallas-Fort Worth Airport Texas, 75261	American Automobile Ass. 1000 AAA Drive Heathrow, Florida 32746-5063
American Consumer Products, Inc. 3110 Solon Road Solon, Ohio 44139	American Management Systems 1777 North Kent St Arlington, VA 22209	Amway Corporation 7575 East Fulton Road Ada, Michigan 49355
AT&T 100 Southgate Parkway Morristown, NJ 07960	Automatic Data Processing, Inc. One ADP Boulevard Roseland, New Jersey 07068	Bechtel Group of Companies 12440 E. Imperial Hwy Norwalk, CA 90650-3134
Belk Stores Services, Inc. 2801 West Tyvola Rd Charlotte, NC 28217- 4500	BP America 200 Public Square Cleveland, OH 44114-2375	Burlington Industries 3330 West Friendly Ave. Greensboro, NC 27420
Cargill, Incorp. 15407 McGinty Rd W. Minnetonka, Minnesota 55345	The Clorox Company 1221 Broadway Oakland, CA 94612	Chrysler Corporation 12000 Chrysler Drive (CIMS 416-13-15) Highland Park, Michigan 48288-1919
Computer Associates International, Inc. 1 Computer Assoc Plaza Islandia, New York 11788-7000	McDonnell Douglas Corp. 3855 Lakewood Blvd Long Beach, CA 90846	Dow Corning Corporation 2200 West Salzburg Road Midland, Michigan 48686-0994
EDS 12200 Park Central Drive Dallas, TX 75251	Ernst and Young 787 Seventh Avenue New York, New York 10019	Ford Motor Company The American Road Dearborn, Michigan 48121

GE  
3135 Easton Turnpike  
Fairfield,  
Connecticut 06431

General Mills Inc.  
One General Mills  
Boulevard  
Minneapolis,  
Minnesota 55446

The Goodyear Tire and  
Rubber Company  
1144 East Market Street  
Akron, OH 44316

Hallmark Cards Inc.  
2501 McGee Trafficway  
Kansas City, Missouri  
64141-6580

Hewlett-Packard  
Company  
3000 Hanover Street  
Palo Alto, CA  
94304

ICI Americas Inc.  
Concord Pike and New  
Murphy Road  
Wilmington, Delaware  
19897

Johnson & Johnson  
1 Johnson & Johnson  
Plaza  
New Brunswick, NJ  
08933

Merck & Co., Inc.  
126 East Lincoln  
Ave  
Rahway, NJ 07065

Microsoft  
One Microsoft Way  
Redmond, Washington  
98052-6399

NationsBank Corp.  
NationsBank Plaza  
Charlotte, NC 28255

NCR Corporation  
1700 S Patterson  
Blvd  
Dayton, OH 45479

New York Life Insurance  
51 Madison Avenue  
New York, New York 10010

Otis Elevator United  
Tech.  
One Farm Springs  
Farmington,  
Connecticut 06032

Parke-Davis Werner  
Lambert Co.  
201 Tabor Road  
Morris Plains, NJ  
07950

Pitney Bowes, Inc.  
One Elmcroft Road  
Stamford, CT  
06926-0700

Scientific-Atlanta,  
Inc.  
One Technology Pkwy  
Norcross, GA 30092

Sterling Winthrop  
Inc.  
90 Park Avenue  
New York, NY 10016

The Turner Corporation  
375 Hudson Street  
New York, NY 10014

Utica National  
Insurance Group  
180 Genesee Street  
New Hartford, NY  
13413

Varian  
3100 Hansen Way  
Palo Alto, CA 94304

R.D. Werner Company  
Werner Road  
Greenville, PA 16125

Amgen  
1840 DeHavilland Dr  
Thousand Oaks, CA  
91320

Anheuser-Busch  
One Busch Place  
St Louis, MO 63118

Briggs & Stratton  
12301 West Wirth St  
Wauwatosa, WI 53222

Cigna 1650 Market Street Philadelphia, PA 19192	Chubb 15 Mountain View Rd. Warren, NJ 07059	Circus Circus 2880 Las Vegas Blvd S. Las Vegas, NV 89109
Dial 1850 North Central Ave Phoenix, AZ 85077	E-Systems 6250 LBJ Freeway Dallas, TX 75240	Dun & Bradstreet 299 Park Ave New York, NY 10171
Eastman Kodak 343 State Street Rochester, NY 14650	Equifax 1600 Peachtree Street NW Atlanta, GA 30309	Fluor 3333 Michelson Drive Irvine, CA 92720
Fruit of the Loom 233 South Wacker Dr Chicago, IL 60606	Giddings & Lewis 142 Doty Street Fond du Lac, WI 54935	Immunex 51 University Street Seattle, WA 98101
Intel 2200 Mission College Blvd Santa Clara, CA 95052	Kimberly-Clark 545 E. Carpenter Fwy Irving, TX 75062	Nike One Bowerman Drive Beaverton, OR 97005
McDonald's One McDonald's Plaza Oak Brook, IL 60521	J.C. Penney 6501 Legacy Drive Plano, TX 75024	Paychex 911 Panorama Trail S. Rochester, NY 14625
Snap-On Tools 2801 80th Street Kenosha, WI 53141	Cirrus Logic 3100 W. Warren Ave Freemont, CA 94538	Cisco Systems 1525 O'Brien Drive Menlo Park, CA 94026
Citicorp 399 Park Ave. New York, NY 10043	Citizens Utilities High Ridge Park Stamford, CT 06905	Clayton Homes 4726 Airport Hwy Knoxville, TN 37901

CML Group  
524 Main Street  
Acton, MA 01720

CMS Energy  
330 Town Center Dr  
Dearborn, MI 48126

CNA Financial  
CNA Plaza  
Chicago, IL 60685

Coastal  
Nine Greenway Plaza  
Houston, TX 77046

Coca-Cola  
One Coca-Cola Plaza  
NW  
Atlanta, GA 30313

Coleman  
250 North St. Francis  
Wichita, KS 67202

Colgate-Palmolive  
300 Park Ave  
New York, NY 10022

Colonial  
1200 Colonial Life  
Blvd  
Columbia, SC 29210

Coltec Industries  
430 Park Ave  
New York, NY 10022

Comcast  
1234 Market Street  
Philadelphia, PA 19107

Comdisco  
6111 North River Rd  
Rosemont, IL 60018

Comerica  
Renaissance Center  
Detroit, MI 48243

Commerce Clearing House  
2700 Lake Cook Rd  
Riverwoods, IL 60015

Commonwealth Edison  
125 South Clark  
Street  
Chicago, IL 60603

Communications Satellite  
950 L'Enfant Plaza SW  
Washington, DC 20024

Compaq Computer  
20555 State Hwy 249  
Houston, TX 77070

Computer Sciences  
2100 East Grand Ave  
El Segundo, CA  
90245

Compuware  
31440 Northwestern Hwy  
Farmington Hills, MI  
48334

ConAgra  
One ConAgra Drive  
Omaha, NE 68102

Conner Peripherals  
3081 Zanker Rd.  
San Jose, CA 95134

Cooper Tire & Rubber  
701 Lima Ave.  
Findlay, OH 45840

Appendix B: Listing of the Malcolm Baldridge National Quality Award Winners (Manufacturing and Service) and Their Addresses

Milliken & Co., Inc.  
P.O. Box 1926  
Spartanburg, SC 29304

General Motors Corp  
Cadillac Motor Car Co.  
3044 West Grand Blvd  
Detroit, MI 48202

Xerox Corp  
Business Products and Systems  
P.O. Box 1600 800 Long Ridge Road  
Stamford, CT 06904

IBM  
Old Orchard Road  
Armonk, NY  
10504

Federal Express Corp.  
2005 Corporate Ave.  
Memphis, TN 38132

Texas Instruments, Inc.  
Defense Systems and  
Electronics Group  
13500 N. Central  
Expressway  
P.O. Box 655474  
Dallas, TX 75265

Westinghouse Electric Corp.  
Westinghouse Bldg, Gateway Center  
Pittsburgh, PA 15222

AT&T  
Network Systems Group  
Universal Card Services  
32 Avenue of The Americas  
New York, NY 10013

Motorola, Inc.  
303 East Algonquin Road  
Schaumberg, IL 60196

Solelectron  
847 Gibraltar Drive  
Milpitas, CA 95035

The Ritz-Carlton Hotel Company  
3414 Peachtree Rd NE Suite 300  
Atlanta, GA 30326

Zytec Corp.  
7575 Marketplace Drive  
Eden Prairie, MN 55344

Granite Rock Co.  
P.O. Box 500001  
Watsonville, CA 95077

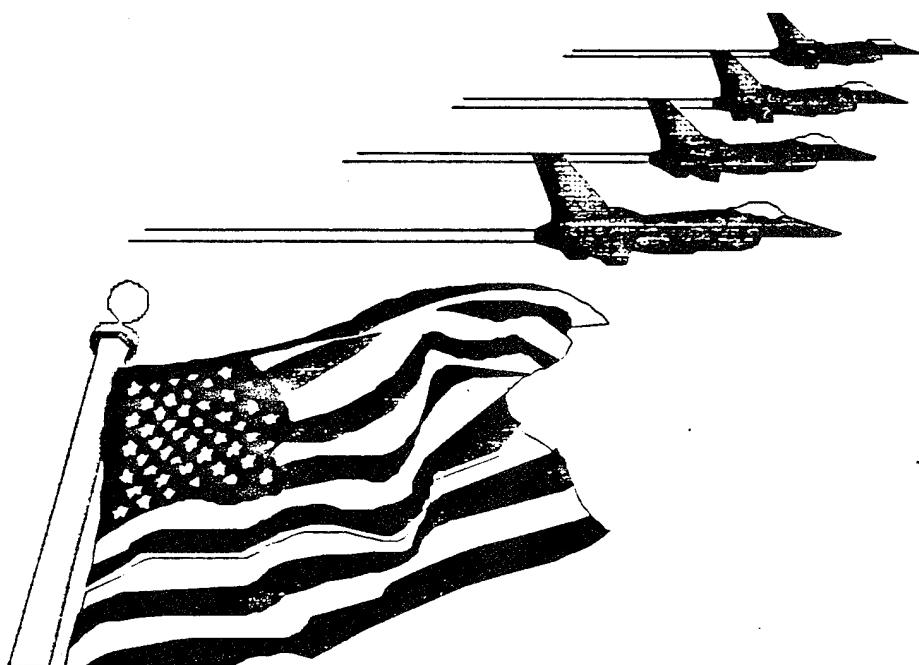
Marlow Industries  
10451 Vista Park Rd.  
Dallas, TX 75238

Wallace Co.  
P.O. Box 1492  
Suite 390  
Cleveland, OH 44131

Globe Metallurgical, Inc.  
6450 Rockside Woods S  
Houston, TX 77251

Appendix C: Draft - Meeting Management Guide

*An Air Force Guide For Effective Meeting Management*



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## **INTRODUCTION**

Meetings are a basic tool of transferring information within organizations. Meetings are held to distribute information, to gather information for decision making, to make decisions, and to train organizational members. Unfortunately, attending and leading meetings are some of the most time-intensive activities for which a manager is responsible, not to mention some of the most frustrating. As a manager, one can expect to easily spend 50% of each day involved in meetings. As a line employee, the portion of each day spent in meetings can approach 20%.

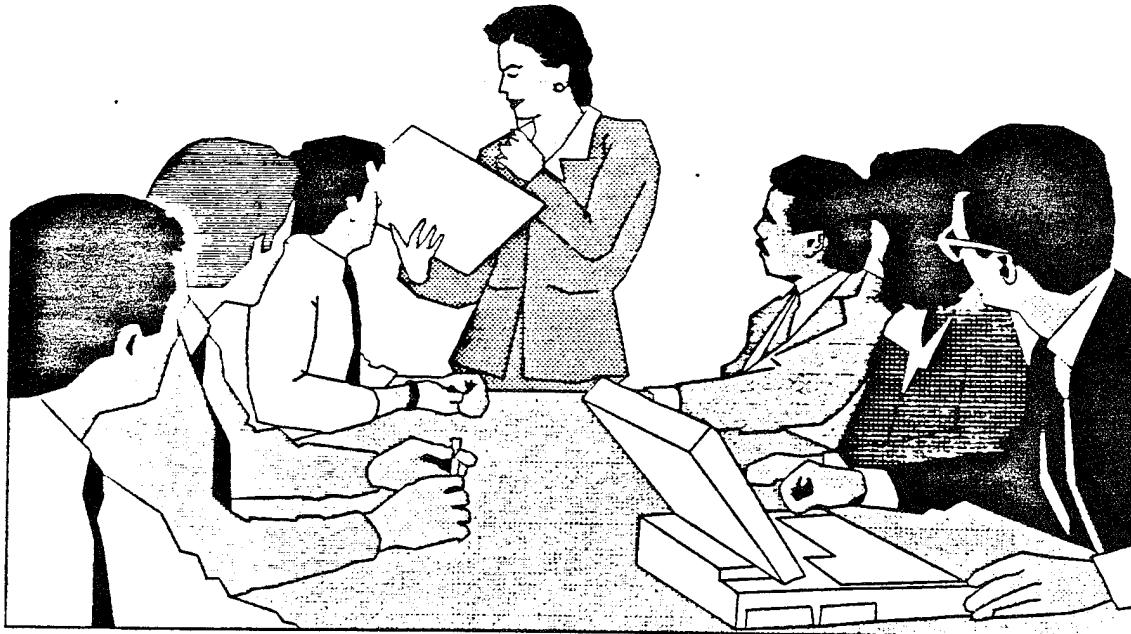
Stretching our minds beyond our own plight, and even that of our organization, there are approximately 17 million meetings conducted each day in America. Survey results reveal that up to 75% of these meetings are a waste of time for half of the total meeting duration. This means that American organizations are facing a massive source of unproductivity and are improperly using resources. Since organizational meetings are such a tremendously common activity, why are they so often ineffectively run, rarely accomplish their objective, and give birth to other fruitless meetings? The simple answer is that we, as organizational members, are not trained in the proper meeting management skills, do not take it upon ourselves to develop our skills, and generally accept wasteful meetings as a part of the daily routine.

## **OBJECTIVE**

The objective of this guide is to reverse the course of the death-spiraling meeting by providing organizational leaders the essential information necessary to conduct efficient and effective meetings. However, the information included in this guide is only as helpful as the reader chooses to make it. It is important to read this document as a whole in order to cleanse the mind of the status quo and to take on the proper mindset of change, responsibility, and purpose. Once this change in mindset is complete, the reader is then prepared to delve into each section. Only through self-analysis, deliberate application, and constant focus will these principles embed themselves into actions and results. This is not an easy task, but the achievable benefits will truly make the effort worthwhile.

## OVERVIEW

Now that the objective driving this guide is clear, along with the reason for its need, it is proper to discuss organization – the road map. First, we will begin with a discussion of the benefits to both the organization and the individual of learning effective meeting management skills. Second, an in-depth discussion of the basic elements of any meeting and those elements critical to success will be presented. Next, we will progress to examine a past meeting where you were a participant. By performing the past meeting evaluation it is my desire that you will see how the majority of meetings do not properly include the basic elements of a quality meeting. Fourth, we will discuss in detail how to conduct an organizational meeting to include sample forms and worksheets to make meeting execution simpler. Finally, this guide is concluded with a short motivational charge.



## BENEFITS OF HAVING EFFECTIVE MEETING SKILLS

The goal of this guide is to teach managers how to better conduct meetings so that their organization can improve its use of resources and improve its efficiency of operations. Along the path towards reaching this goal, it is important for managers to realize there are many personal benefits to reap as well as organizational benefits.

**1. Benefits to the Organization.** As previously mentioned, managers and workers alike routinely face a significant portion of each day involved in organizational meetings. When meetings are unproductive, inefficient, or unnecessary, the time of those attending is wasted. The wasted time could have been spent more productively in another capacity as determined by the individual and the particular pressures faced that day. *Therefore, effective meetings make better use of peoples' time.*

However, wasted time is not the only result of poorly run meetings. People naturally grow irritable, angry, and dissentious when their time is controlled by others, especially when it is in a manner that they feel is foolish. In addition, meetings deny customers, subordinates, and supervisors access to the attendees for the duration of the meeting. The resulting effects of unproductive meetings are disgruntled employees, unhappy peers, and customers who feel that support for their needs is missing. *Likewise, the benefits of effective meetings are the reduction of these problems.*



Time is money. Organizations, the Air Force included, pay their employees to perform tasks that contribute to the organization's success. These tasks may include strategic planning, marketing of the services the organization offers, executing the organizational mission, or simply answering the telephones. Regardless, wages are compensation to the employee for their time. It does not matter whether employees are salaried or hourly, they are still paid in proportion to the value of their labor to the organization. Unfortunately, when unproductive meetings absorb significant portions of our week, we simply accomplish less. While many managers recognize the time costs of hourly employees, few understand the true time costs of salaried employees. Because we frequently overlook the dollar value of time in combination with conducting inefficient meetings, our meetings are often not efficient

users of organization resources. Therefore, as organizations learn how to better run meetings, organizational resources are more likely to be used efficiently. For support, take into consideration this table:

#### HOURLY COST OF MEETINGS

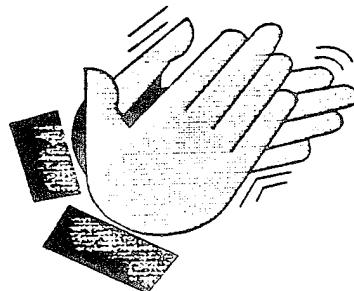
Annual Salary	2	4	6	8	10
\$50,000	\$96	\$192	\$288	\$385	\$481
\$40,000	\$77	\$154	\$231	\$308	\$385
\$30,000	\$57	\$115	\$173	\$231	\$288
\$20,000	\$38	\$77	\$115	\$154	\$192

Number of Attendees

**Example:** Consider a typical weekly staff meeting of 10 people who each have an average salary of \$40,000. The duration of the meeting is usually one hour and is held 50 times a year. As reported earlier, most meetings are a waste of time for half of their total length. Therefore, the annual cost to the organization of such a staff meeting is \$9,625 (.5 x 50 x \$385). This results in \$9,625 worth of misused time! Additionally, most weekly staff meetings are not necessary in the first place. The transfer of information could more effectively take place via e-mail! While managers would never waste such a sum of money on unnecessary equipment, or out-of-date technology, they habitually waste equivalent amounts of time and money on meetings. Now, how many meetings do you attend each week and what portion of each meeting is productive and beneficial to you? Through such an analysis it is relatively easy to see that a benefit to an organization when meetings are effective and efficient is the reduction of waste.

**2. Benefits to the Individual.** Having discussed the benefits to an organization from conducting productive meetings, there are also significant benefits available to the individual who conducts effective meetings. *Individuals who conduct efficient and productive meetings get noticed.* Because so many meetings are recognized as a waste of time, when someone happens to attend a meeting that is well planned, has a specific objective, is conducted efficiently, achieves the objective, and is concluded on time, that attendee forms a positive opinion of the meeting leader. Over time this opinion spreads throughout the organization by others who are fortunate enough to participate in one of the leader's meetings and by the originally described attendee. Subordinates and peers soon recognize the individual and begin to if not enjoy, then happily tolerate, attending one of her meetings. They feel this way because they know they will achieve the meeting's objective without wasting their own valuable time. Their willingness to attend infects their behavior and they become better meeting participants. Perceptive senior managers soon hear about the manager who runs a quality meeting and their opinions of the individual rise as well. What I just described is one way we, as individuals, can benefit from using effective meeting management skills. If this is not enough motivation for you, then what about the following train of thought?

Many organizational meetings are held to brief senior leaders on a project's status or to request approval for pursuing a course of action. Senior leaders have even more demands on their time than you or I, and they are prone to form their opinions about each of us from our face-to-face encounters. Because they do not interact with us each day, they are left with only those few occasions where we may be conducting a meeting they are attending. *Can you think of a better way to impress such a person than though a fantastically run meeting that achieves the established purpose in minimal time? I cannot.*

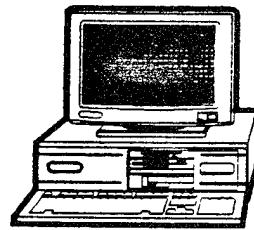


## ELEMENTS OF MEETING SUCCESS

I hope that at this time you are sufficiently motivated to read the remainder of the guide with care. This section will present the essential elements of meeting success.

**1. Proper Meeting Reasons.** When a person is considering holding a meeting, the individual should first ask himself whether a meeting is really necessary; "Why do I want to hold a meeting?" Is a meeting the only way to get across the ideas or to accomplish the purpose? Could you use:

- \* an e-mail message
- \* voice-mail message
- \* series of telephone calls
- \* personal visit, or
- \* memorandum



to accomplish the same result in a more efficient manner? You should be conscious of the time costs and morale implications of holding meetings when they are not absolutely necessary.

To assist you in deciding when a meeting is appropriate, it is important to remember that meetings should only take place when group interaction or exchange is essential. Such circumstances include some forms of training meetings (how to make the most from a new software tool); when you need to gather information for decision making, especially when the decision impacts several groups (re-organizing functional areas along a matrix structure); when you are seeking out upward communication (want to make yourself available to subordinates and to address any concerns they may have); and for communicating progress reports that impact more than one group. Whatever the general purpose for the meeting, it is imperative that if a meeting is held, that it does not deal with areas or topics beyond the initial scope. If there is need to delve into other areas, that should be done through a separate activity.

**2. Pre-Meeting Planning and Administration.** After you determine that a meeting is appropriate, you must nail down the specific purpose and objectives for the meeting, prepare an agenda, schedule the meeting, choose participants, and reserve a room.

**A. Know Your Purpose.** This is where you ask yourself, "What exactly do I want to achieve?" For example, if the answer is to gather information to assist in a decision you need to make, then the rest of the planning should have this as the focus. Further, this example of gathering information would be a good purpose, provided the information could not be gathered through another forum.

**B. Establish Objectives.** Once the purpose is set, specific objectives need to narrow the focus to identifiable and concrete actions. If the purpose is the example above, then sample objectives would be to outline the negative aspects associated with a proposed solution, the positive aspects, and the implications of not making a decision at all. With the knowledge of the purpose for the meeting and the objectives to achieve, you then know what constitutes a completed meeting – the accomplishment of the objectives!

**C. Document the Purpose.** As was once told to me by a sage old Technical Sergeant, "information stored in the head is worth as much as a blank piece of paper." It is now time for you to write out the meeting purpose, preferably in one sentence. The physical existence of the purpose statement serves to focus group efforts and is especially effective as a tool to guide the meeting group. In addition, the purpose statement is quite appropriate at the top of the meeting agenda where it is plainly visible to all. To maximize this effect, you should begin each meeting by reviewing the purpose and pointing out where it appears on the agenda as the guiding direction.



**D. Agenda.** A meeting agenda provides direction for the meeting and therefore needs to be carefully prepared. The agenda narrows the focus of the meeting to certain topic areas within the domain of the purpose statement. It specifically spells out:

- what the meeting will cover
- in what order
- at what time
- on which date
- where, and

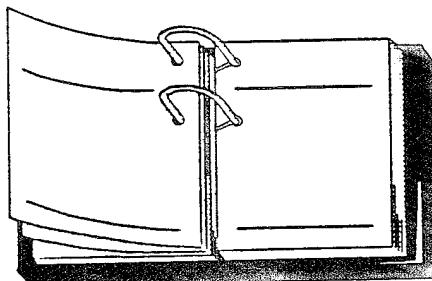
- \* who will be in attendance

Distributing the agenda in advance to those who will be participating is important so that they are able to prepare properly for the meeting. For instance, if the agenda for a managers' meeting indicates the authorization of additional funding to hire a new employee, then each manager who feels they need extra manpower can prepare his case and come armed with support. At a minimum, participants should receive the agenda a full day before the meeting. Attachment 1 *Meeting Organizer* helps the meeting leader in initial meeting planning and later is helpful when actually creating the agenda and conducting the meeting. Attachment 2 *Meeting Agenda Worksheet* is an example of how to format an agenda.

(1) **Agendas for Impromptu Meetings.** Some mistakenly believe an agenda only applies to meetings planned in advance and that impromptu meetings do not need an agenda. Such an idea is far from the truth. In fact, impromptu meetings stand to benefit from agendas as much as any other type of meeting. This is true because hastily arranged meetings take the participants from other important activities which the participants are anxious to return; the participants want to achieve the objective quickly and get back to work. Accordingly, everyone needs to know specifically why they are meeting and what needs to be accomplished from the meeting – the purpose! Often the leader in such meetings assumes everyone's focus is proper and launches directly into the meeting. This results in floundering by the group, wasted time, and ultimately frustration. To prevent such happenings, you should quickly sketch out the purpose for the meeting and the topics to discuss either just before everyone arrives or at the beginning of the meeting with the help of the participants.

**E. Issues to Cover.** Integral to preparing the agenda is determining what issues to cover and how long the meeting should last. Optimally, you would determine the length solely on the amount of truly necessary material to cover. Unfortunately the decision also must consider real world constraints, such as the other activities each participant must attend to, the attention span of participants, the time of day the meeting will take place, and the size of the group. In addition, most tasks take longer than originally planned. Therefore, a small time cushion should be built into the meeting length. Beginning with the material to cover, you must be realistic and realize

that there usually is not time to discuss each aspect of an issue in extreme detail, and therefore decide upon only those aspects that are essential.



**F. Scheduling.** Most people have a full schedule of work everyday and resent activities that interfere with the accomplishment of that work. Sadly, meetings are often viewed as interference. Accordingly, you should make your best effort to work with the schedule of each participant to find a convenient time for the meeting. When you do make the effort to schedule the meeting in such a manner your actions do receive notice by the participants; this serves to start the activity on the right foot. People need to visually see that others care about them and their needs. In this case the caring centers around the time of each individual, something that each holds to be quite valuable. Unfortunately, sometimes this cannot be done and you must choose the time that interferes the least for the majority of participants. Closely tied to this idea is the issue of how long a meeting should last so that it does not exceed the attention span of the participants.

**G. Meeting Length.** Some believe that as we mature our attention spans increase. This may be the case when comparing a two year old to a ten year old, but at some point it becomes relatively fixed. Studies show that meetings extending beyond 60 minutes tend to lose the interest and attention of those involved. In reality, conducting meetings 30-45 minutes in length is closer to the optimal duration. As further support for keeping meetings brief, you need to keep in mind Parkinson's Law, which states that work expands to fill the time available. If the meeting will consume whatever amount of time you have allotted, you might as well minimize the wastefulness and make the meeting a short one. However, if for some reason your meeting does need to extend past the hour mark, you should include a few minutes for a short stretch break. Such a break will refresh and energize participants so the remaining time can be more productive. With this information the leader also needs to consider the impact that various meeting times have.

**H. Time of Day.** There are different views regarding what time of day a meeting should take place with some advocating breakfast or lunch meetings, others desiring meetings just before lunch or quitting time, and the conventional approach of meetings somewhere during the course of the regular work day. Meetings held over meals often ensure brevity and provide a form of social bonding. I once had a commander who held staff meetings over lunch once a week at the Officers' Club. While the meetings were fairly brief, participants were often distracted because they were trying to eat their meal. As a result, most of us would order food that was user-friendly (required little chewing) and less than satisfying. In this particular case the commander had a secondary goal and that was to support the Officers' Club. Thus, meal-time meetings are usually not the most effective in themselves, but often help to achieve secondary objectives.



Meetings held just before lunch or quitting time are also usually quite brief and to the point. However, if the participants come to feel that their personal time is being wasted, or withheld, they may become uncooperative. Thus, you should think very carefully before scheduling meetings just prior to lunch or quitting time. Even though such an idea may seem attractive, you should be wary of the possible downside.

The conventional meeting is held at any time during the work day excluding meals. If you choose this route, try to not schedule the meeting for at least 60 minutes after people arrive in the morning or return from lunch. Your objective is productive participation and both of these times interfere with that objective.

**I. Number of People.** As the number of participants increase, the quantity of conversation also increases; this includes both relevant discussion and distracting discussion. With fewer members it is easier for the meeting leader to keep the meeting on track and moving forward. With large groups the members are more likely to become bored, distracted, and actually interfere with progress.

**(1) Who to Invite?** How does one decide who needs to attend a meeting and how many people to invite? Only invite those that have a reason to attend based upon the meeting purpose and objectives. Such individuals are those whose cooperation or support is needed, those who have decision making authority that you need, and those who have information or skills that are necessary for successful

implementation. The tendency is to invite extra folks to ensure that nobody is forgotten. This is a mistake; having unnecessary meeting participants is a waste of their time. Further, people who are not critical to the achievement of the purpose often end up being distractors – making impertinent comments, expressing non-verbally that they do not want to be there, and getting up and leaving. You should also avoid inviting those individuals that “are always invited.” If they do not have a solid reason for attending, do not invite them.

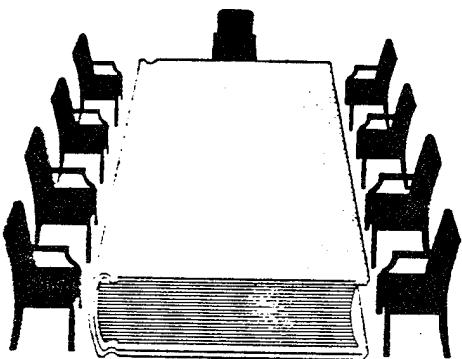
(2) **How Many to Invite?** Group size bears on the effectiveness of any meeting. If too many are present, the meeting will degenerate. If too few, there may be folks missing that are necessary for accomplishment of the purpose. The meeting leader needs to balance group dynamics with effective meeting execution. As individuals are exposed to large groups our willingness to contribute meaningfully decreases. We lose confidence, fear rejection, and withdraw as group sizes increase. The opposite usually occurs with small groups. Therefore, it is rational to say that the smaller the group the better the interaction and exchange.

In addition, large groups are often inefficient users of time because some members need background information explained, it is harder to progress through the agenda, and misunderstandings occur. Often meeting leaders prefer smaller groups because they are easier to lead and focus. To specifically answer the question of how many participants to invite, past research has shown the number of people is dependent upon the meeting type. Please refer to the next page for the table.

#### PEOPLE FOR MEETING TYPES

MEETING TYPE	NUMBER OF PEOPLE
Problem Solving and Decision Making	6
Training	20 to 30
Informational	As Many as Can Fit in the Room

**J. Meeting Room Specifics.** Choosing the location and arrangement of a room to hold the meeting is also important. The room should not be too small, nor too big; there should be enough room for each person without crowding, yet not significant left-over space. The lighting should be bright and even, the temperature should be comfortable, and the room should be relatively insulated from both outside noise and from allowing the conduct of the meeting to be heard by those outside the room. If at all possible there should be a door into the room to close for both privacy and to reduce distractions. If special equipment is necessary, such as white boards, they should be in the room and ready to use before the meeting begins. This means the board is clean and there are markers and an eraser. The chairs should be comfortable without being too relaxing as the meeting has an objective to achieve.



Seating involves strategy on your part. Since most meeting rooms include a table, where should you sit? It really depends on the amount and type of information exchange you are trying to foster. You should sit at the head of the table to confer power, position, and one-way information flow, or in the middle to express open exchange, participation, and equality. Is a rectangular or circular table better? Again, this depends on your personal desires. A rectangular table implies information flowing from you, while a circular table suggests information cross flow. Whatever the physical arrangement, you should never allow empty seats between individuals. In this manner open spacing serves as a barrier between participants.

When you arrive at this point while planning an actual meeting you should take a few minutes to complete a worksheet similar to that in Attachment 1 **Meeting Organizer**. This helps you to document and crystallize your thinking on subjects discussed so far: purpose, agenda, time, participants, and location.

**3. Post-Meeting Activities.** The third critical element to meeting success is that which takes place after the meeting, the post-meeting activities. At this point, I am purposefully skipping how to actually conduct an efficient and effective organizational

meeting in order to express the final elements for success. Once these are behind us, we will delve into meeting conduct. There are three subelements for the meeting leader to keep in mind: meeting minutes, post-meeting evaluation, and follow-up of action items.

**A. Meeting Minutes.** Meeting minutes are the documented record of the discussion, decisions, and action items from a meeting. They are useful to keep non-participants, or participants who could not attend, apprised of meeting happenings, as a record of what transpired, as a tool for tracking required actions, and as a collective memory for the group. It is your duty to assign someone the responsibility for preparing the minutes. Since most meetings do not have the luxury of a meeting secretary, that responsibility must fall on the shoulders of one of the participants. It does not matter who the individual is, as long as they are competent, thorough, and dependable. Some believe the meeting leader should prepare the minutes because no one else is as concerned with the success of the meeting as the leader. Others counter that the leader usually has too many other activities going on to plan, conduct, and prepare the minutes for the meeting.



**(1) Contents of Minutes.** Regardless of who prepares the minutes there are certain items the minutes should contain. It is your responsibility, as the meeting leader, to ensure the below items are in the minutes. If they are not, you must work with whomever prepares the minutes to rectify the situation. By attaching a copy of the agenda to the minutes the time, date, purpose, participants, and location are known. All that is left is for the preparer to capture the significant views, decisions, and other outcomes for each topic. The preparer needs to take special care to reflect comments and decisions in the actual words used in the meeting, as to avoid later confusion. The minutes should not contain the verbatim comments as that would be cumbersome and not relevant. Special attention is necessary for action items to reflect who is responsible, what is to be done, and when it is to be accomplished; this will

assist in follow-up. This also prevents individuals from later claiming they did not know they had an action item when the minutes specifically so state.

(2) **Minutes Suggestions.** Suggestions when preparing the minutes are to jot down notes beside each agenda item on the agenda itself, to use a flip chart, or to use a minutes worksheet similar to that in Attachment 3 *Meeting Minutes Worksheet*. Another option is to have the leader create an expanded agenda that includes several blank lines between topics for the preparer to write notes. These notes can then be formalized into minutes within 24 to 48 hours following the meeting and distributed to participants. If it happens any later, people will forget what took place. Further, policy should allow participants to provide corrections to the minutes when they are in error. Revised minutes should be sent back to each participant and filed with past meeting minutes.

**B. Post-Meeting Evaluation.** One aspect of Total Quality Management (TQM) is the improvement of organizational processes through evaluation and change. The belief is that improvement of processes results in greater efficiency and effectiveness and helps the organization. Meetings are processes and therefore require the same evaluation for improvement. Evaluation after each meeting should be done by you, as the leader, at a minimum. To help you evaluate your own meeting there is a self-evaluation worksheet in Attachment 4 *Post-Meeting Self-Evaluation Form*.



Optimally, participants in the meeting will also assist in the meeting evaluation to bring out strengths, weaknesses, and areas for improvement. To facilitate feedback you can use group evaluation forms to make providing feedback easier, such as in Attachment 5 *Group Post-Meeting Evaluation Form*.

**Meeting Evaluation Form.** Alternatively, you can ask for verbal comments at the end of a meeting. If you ask for verbal comments, you need to be sure to not take the comments personally while at the same time encouraging the group to critique the meeting as a distinct event. One way this can work is for each person to state at least one thing that went well in the meeting and one thing that did not go well. Some

believe that getting written feedback is best but this must be balanced with the fact that people are less likely to spend quality time on such a task as there are other tasks to perform. Therefore, it is probably best to choose an evaluation approach that is the least painful for the members to comply with.

C. Action Item Follow-Up. Finally, since many meetings include the assigning of action items or tasks, you must perform follow-up on these activities to ensure their accomplishment. Meetings are held to accomplish an objective, and if the tasks are integral to the success of a project or undertaking, the non-accomplishment of the tasks hurts the organization. Further, non-accomplishment destroys any gains made by an otherwise productive and efficient meeting. Therefore, meeting leaders must require accountability of participants to the rest of the group in accomplishing action items. An example of how this can be done is to have the accountable person give an update at a future meeting.

## EVALUATION OF A PAST MEETING

So far you have read about the necessary activities for meeting success without having had any discussion on how to conduct a meeting. Before meeting conduct is covered in detail, you should now complete *Reviewing a Past Meeting* in Attachment 6. The purpose of completing the worksheet at this time is to demonstrate through your own experience how most meetings do not contain the critical elements for success, are not conducted efficiently, and are usually poorly planned. Further, after seeing the results of this exercise, my hope is that it will provide an extra incentive for you to pay close attention to the meeting conduct section.

Before completing the worksheet, take a moment to think back to a recent meeting you attended. To be current in your memory it is preferable that the meeting will have been within the last week. Now, please turn to the worksheet and complete it. Start by filling out the top, which pertains to the chosen meeting topic and date, then go on to the meeting purpose and meeting objectives. After these are filled in, go ahead and complete the boxes. Finally, glance back over the completed worksheet, think back to the essential elements for meeting success discussed previously, and fill in the "How could the meeting have been improved?" section.

So, what did you find? Was the meeting a text book example of planning and effectiveness, or was it hastily prepared and poorly run? Could you identify the purpose for the meeting and was the meeting conducted to achieve that purpose? Did the meeting drag-on wasting both your time and the time of the others? I hope for the sake of the Air Force and your organization that the meeting you chose was a case study in effectiveness; however, I doubt that it was. If the meeting you evaluated was an excellent one, then you are one step ahead of most of us and ready to use this guide to fine tune your meeting skills learned from previous observations. If the meeting you evaluated was less than successful, especially if you were the meeting leader, there is hope. What you should do is continue reading, study the information presented in this guide, and apply the information. Later, when you get a chance to conduct your next meeting, do so with the principles in mind. Then, complete the *Reviewing a Past Meeting* worksheet on your meeting!

It is now time to discuss how to conduct a successful meeting.

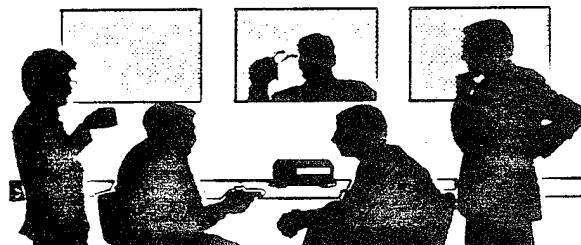
## CONDUCTING A SUCCESSFUL ORGANIZATIONAL MEETING

You have read about how to plan for successful meetings, and now it is time for further instructions on conduct. This section focuses on conducting an information gathering meeting or decision making meeting. If you are to lead a training meeting, the same basic concepts apply.

1. Reminder. One to two days before the meeting is scheduled, you should call or send participants a meeting reminder as in Attachment 7 *Meeting Reminder/Notice*. The meeting reminder serves as a memory jogger to ensure participants are aware of the meeting and know what to expect of the meeting. Perhaps more importantly, the meeting reminder shows that you, as the meeting leader, mean business; you are organized, prepared, and committed to conducting the meeting effectively. Psychologically such a message carries more weight than one might think! Depending on when the agendas were sent out, it may be a good idea to attach a copy of the agenda to the meeting reminder. Further, the format in Attachment 7 can be easily put into electronic format and sent via e-mail!

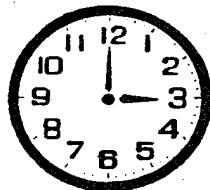
2. Review Earlier Planning. Within an hour of the meeting start time, review the completed meeting organizer your prepared in the planning phase (Attachment 1 *Meeting Organizer*). You need to be focusing not only on the purpose and objectives of the meeting before you, but also on the management of the meeting – the conduct. Part II of the meeting organizer provides seven basic bullets to get you on the road towards a successful meeting.

- \* Open with the purpose
- \* Encourage participation
- \* Prevent domination by any one member
- \* Assign minutes
- \* Summarize decisions, key points, and responsibilities
- \* Plan for follow-up



Review these bullets and make sure you follow them!

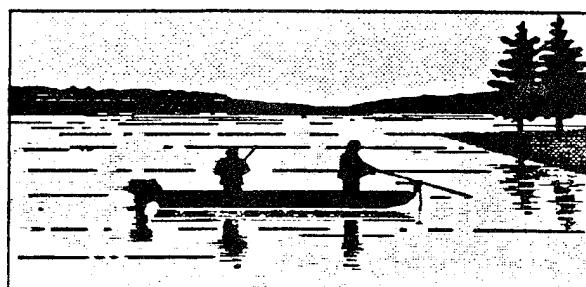
**3. Start!** Now, it is important to get your meeting off to a positive beginning. As with first impressions of people, there are also first impressions of meetings. Always



begin on time.

If you do not know all of the participants, introduce yourself and say a few words about your background. Even if you do know everyone well, start the meeting formally with a welcome. This formally marks the beginning of the meeting and sets the stage for your next move, which is to clearly express the purpose of the meeting and the objectives to accomplish during the meeting. Let everyone know that you intend to stick to the planned stop time and therefore need their help in staying focused so that you can progress through the agenda items. Depending on your familiarity with the members you may need to lay some ground rules, such as respect the person who is talking, no personal attacks are allowed, etc. Some experienced meeting leaders recommend using two overhead projectors at this point: one to display the meeting purpose and the second to display the agenda. This is something that each person must decide on their own. However, remember that while overheads can be a valuable tool, they often take people's attention away from you.

**A. Icebreaker.** If it has been a rough day and the folks are a little tired, try an icebreaker. Mentally or physically exhausted participants will not help your meeting to succeed! Ask everyone to stand up for 10 seconds and stretch, have members introduce themselves and state one thing they plan to do in the upcoming weekend, or keep a small supply of jokes or overhead cartoons with you to create some liveliness. These are just a few examples and more can be found in the Business Section of your local bookstore.



**B. Late Arrivals.** If a participant comes in late, do not stop the meeting to bring them up to speed; make it somewhat uncomfortable for them. If possible, arrange the room so that late comers are noticed by everyone and unable to "sneak in". Another distraction involves those who have secretaries or associates bring them messages. Granted, some things are vital and must be attended to, but make it the exception and not the rule. Unfortunately, you may need to openly state such a rule.

**C. What's At Stake?** As the meeting begins, you need to keep in mind that participants will do their best when they realize the importance of the meeting. This is especially true when the participants stand to be either personally hurt or helped. Do not cry wolf, but if there are big stakes involved, let them know it.

**D. Open Discussion.** Starting with the first agenda item, introduce it, state how it relates to the purpose, and ask for comments. You must be willing to hear what others have to say, both good and bad. Foster openness and do not shoot the messenger for bringing up discouraging but truthful news. If you do shoot the messenger or are close minded, participants will learn very quickly not to rock the boat. As a result, your meetings will become anything but effective. Further, you would be wasting the time of those involved. Therefore, make a conscious effort to both draw-out ideas from others and to really listen to those ideas.



**E. Encourage.** Encouraging participation is not as easy as it sounds; sometimes people are afraid to speak out in front of others, do not want to appear stupid, or are otherwise afraid of rejection. To make it easier for members to participate you need to ensure that members do not criticize each other, you need to drive out the fear that a person's ideas will be met with ridicule or mockery. Fear of criticism often occurs when there is a meeting bully.

(1) **Meeting Bullies.** A meeting bully is a person that consciously or subconsciously insists on making comments (often snide), has an opinion on everything and expresses it, and generally tries to dominate discussions to his point of view. Maintaining control of a meeting bully is vital! Failure to do so will destroy the synergy and progress of your group. Fortunately group behavior will

broadcast signs of bullying so that even the most unperceptive leader is made aware; look for shifting of chairs, participants looking around the room, side discussions, and people working on other things. When these occur you must do something.

(2) **Bully Tactics.** When the meeting bully is beginning her monologue, jump in when she breaks for air and say something along the lines of, "That's very interesting, now let's relate that back to the agenda." An alternate method for a persistent bully is to:

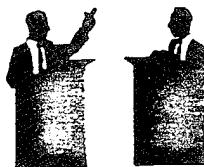
- \* Name and identify the behavior – openly tell the person that she is distracting the group and hindering the meeting by her constant interruptions and lack of focus.
- \* State the impact of her actions – go on to state that the purpose for the meeting is an important one and that you cannot allow her to de-rail it.
- \* Suggest a more appropriate behavior – finish by expressing she has value to the group but needs to participate appropriately.

If you are in a position to walk around while leading the meeting, walk over to the bully and occupy her personal space -- either just behind her chair or standing next to her. This makes most people uncomfortable and will usually cause an alteration of behavior. If neither of these steps work, take the bully aside at a break and lay it on the line – either she quit disrupting the group or she leaves. It just may come down to asking the person to leave, but this is unlikely. Please note that these same methods can be effective when dealing with conflict in the group.

F. **Group Conflict.** Conflict is not necessarily good nor bad. There are two types of conflict, functional and dysfunctional. Functional conflict includes confrontation that enhances group performance and often manifests itself through new ideas and creativity. Dysfunctional conflict hinders group goal achievement and often takes the form of blaming, attacking, and avoiding responsibility. Your task is to recognize the difference between the two types and to prevent the latter. The fine line separating functional from dysfunctional conflict is a hard one to recognize and this results in leaders often trying to stop all forms of conflict. This is not a good approach. The effective meeting leader will educate himself on this subject because



the effects of functional conflict can reap wonderful benefits in meetings and organizations.



G. Groupthink. The opposite of conflict is groupthink, something you must be conscious of and try to avoid. Typically, groupthink occurs in highly cohesive groups as individuals lose their independent thinking. Specifically, groupthink is the destruction of moral judgment and mental independence among individual group members. A result of groupthink is participants who are unwilling to speak-out against group ideas in the interest of group solidarity; members feel pressure to conform to the group. One method you can use to avoid groupthink is to foster a certain level of functional conflict through disagreement. Make it known that you do not want a bunch of "yes" men and women and that you will not punish those who disagree. Let it be known that you expect total support once a decision is settled upon, but until then you want to hear dissenting views when they exist.

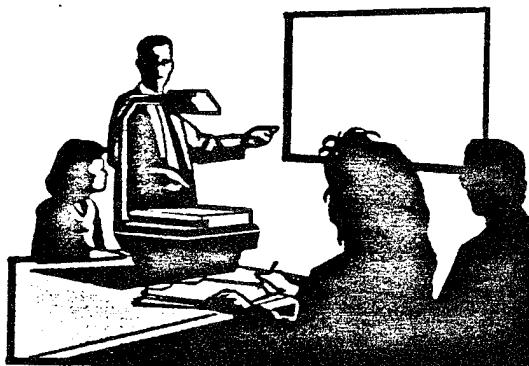
H. Ask Questions. Getting back to the issue of encouraging participation, you need to learn how to ask the proper type of questions of your participants in order to draw-out their participation. This does not mean asking questions along the lines of a prosecuting attorney but that of the inquisitive professor. You can ask questions to:

- \* identify events or recall a situation when trying to establish circumstances and background for the group - "What happened next?" or
- \* prompt thinking and analysis of an issue - "Where is this process faulty? How would you improve it?"

When re-directing a question posed to you that you want someone else to answer try, "That's a valid question Bill. Alan, could you please try to explain why you think the decision was made?" Re-directing in particular can be effective to withdraw yourself as the "fountain of knowledge", which often is a fallacy in itself, and promote discussion among the group.

I. Brainstorming. When the topic needs extensive creativity, a quick brainstorming session may be appropriate. Brainstorming is the process of gathering a wide range of free-flowing ideas to later evaluate and aid in decision making. It can be done by having a recorder write down the ideas presented by a group on either a white

board, overhead transparency, or large sheet of paper. No ideas are to ever receive criticism. After finishing the brainstorming, the group evaluates the documented ideas and either picks one or chooses to explore a few in further depth.



**(1) Evaluation Upon Merit.** Integral to both brainstorming and normal discussion is the idea that all ideas should receive evaluation on their merits without consideration of who stated the idea. Participants embody varying levels of organizational power which do not necessarily correlate to the quality of their ideas. Under normal circumstances, people are wary to disagree with someone higher in position than they are while others tend to look down upon ideas generated by junior members. To truly have quality discussion your meetings must be fair in all respects and this includes the evaluation of ideas.

**J. Involvement.** When participants are content to be wall flowers, you have a problem; do not let them. Enact role playing or direct your comments to such members to force them into involvement. Remind each member that they were invited specifically because they are needed to accomplish the purpose. Reiterate that if they are not participative, they hurt the whole group and ultimately the organization.

**K. Stay Focused.** It is important that you keep focused on the meeting purpose and work to accomplish the objectives; often discussion tends to drift away from the issues and you should use the agenda to reel participants back. Once adequate discussion is complete, you need to bring closure to the topic before going to the next agenda item. For decision making meetings, some meeting leaders favor a group vote. A disadvantage of group voting is that there are times when a decision

must be made by one person – the leader – and leaving the decision to a group is not effective. As the leader of the meeting, you must remember that you are still responsible and that the participative meeting approach does not absolve you of that responsibility. Therefore, you will need to find what is comfortable for you depending on your personality and the situation. Whatever method you choose to make decisions, it should be understood by all in attendance.

L. Be Flexible. Unfortunately, even with the best meeting management, some agenda items drag. If the issue is one that does not require an immediate decision or action, it may be best to set it aside and go to the next item. The reason for this is to keep things flowing or risk losing the attention of the participants. Also, you must be committed to finishing the meeting on time. If the item does require immediate action you have two choices. First, you may have to make a decision on the spot. Second, if this alternative is not viable, you may have to close discussion and take some time after the meeting to weigh the facts before coming to a decision. Either way, press on to the next topic.

M. Participant Ownership. Critical to leading effective meetings is the concept of ownership. Ownership is an element of Total Quality Management. The idea is to foster the feeling of ownership down to the lowest levels possible in an organization. Ownership results in interest and commitment, two keys for a successful meeting. When dealing with meetings, as the leader your goal should be to help the participants take ownership of the meeting. This translates into feelings of responsibility for the progress of the meeting, the material discussed, and the outcomes. A leader can do this by treating people fairly, only calling a meeting when necessary, truly listening and considering presented ideas, and providing a constructive and supportive meeting environment.

N. Close the Meeting. As mentioned earlier, an essential aspect of meeting management is to finish on time. Some leaders make a contract with meeting members that if a meeting runs late, the leader buys coffee or donuts at the next meeting. There needs to be something small but tangible to help enforce this requirement. Further, if you accomplish the purpose before the stated ending time, stop! In order to finish on time, leave yourself



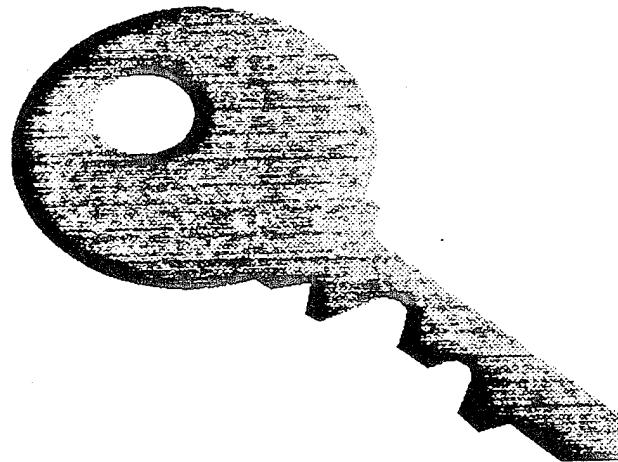
three or four minutes to conclude the meeting. Spend that time summarizing the important points covered as well as important decisions made. If you assigned action items, review the items including who is responsible and when action is due. Wrap up any loose ends and ensure the individual who will prepare the meeting minutes does not have any questions. Re-cap the original purpose of the meeting and what was accomplished. If possible, perform a quick evaluation of the meeting as a group. Thank the group for their participation and assistance and let them leave.

## CHARGE

You have finished reading this guide and the information I feel to be most relevant to your success in planning and leading organizational meetings. The information presented does not hold true for only the Air Force or the Department of Defense, but for all organizations around the world. What you do with this information is up to you. However, my hope is that you will take it, use it, share it, and improve upon it. With this hope Attachment 8 *Essential Meeting Points* is included as a one page summary for your use and for you to give to others.

At this stage I am reminded of the phrase "quality is free." This phrase means that in the short term producing a high quality product involves more money and time than producing a low quality product. However, the extra expense associated with the high quality product is more than compensated for by the longer term increased efficiency, effectiveness, and customer satisfaction.

You now hold the key!



## Attachment 1: ***Meeting Organizer***

### PART I - COMPLETE DURING PLANNING

Date of meeting: \_\_\_\_\_

Place: \_\_\_\_\_

Purpose & objectives:

---

---

Time	Start:	Stop:	Total Hrs:
------	--------	-------	------------

Participants: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Agenda Items to Discuss:

<input type="checkbox"/>	_____

(In the boxes arrange the proper sequence)

Agenda:

- time (start and ending)
- location
- subject
- list of attendees
- purpose & objectives
- distribute in advance

Facilities:

- lighting and ventilation
- proper size/space
- quiet
- special equipment
- available
- reserved

Notice:

- participants notified
- reminder sent

---

### PART II - REVIEW JUST PRIOR TO MEETING

Conduct:

- \* open with the purpose
- \* prevent domination by any one member
- \* summarize decisions, key points & responsibilities
- \* encourage participation
- \* minutes assigned?
- \* plan for follow-up

Additional Considerations:

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**Attachment 2: Meeting Agenda Worksheet**

Purpose:

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---

Meeting Date: \_\_\_\_\_ Meeting Start: \_\_\_\_\_ Meeting End: \_\_\_\_\_

Meeting Place: \_\_\_\_\_ Meeting Chaired By: \_\_\_\_\_

Participants:

	Name	Office Symbol	Extension
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			

Agenda Items

	Description	Time Length
1.		
2.		
3.		
4.		
5.		
6.		
7.		

Special Information:

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### **Attachment 3: *Meeting Minutes Worksheet***

Date: \_\_\_\_\_

**Topic:** \_\_\_\_\_

Start/end time: \_\_\_\_\_

**Meeting Leader:** \_\_\_\_\_

**Purpose:**

#### **Key Discussion Points:**

(continue on back or on separate sheet)

#### Action Item Responsibility:

- Copy of Agenda Attached
- Listing of Participants Attached

Distribute Completed Minutes to All Participants Within 48 Hours

**Attachment 4: Post-Meeting Self Evaluation Form**  
(check all boxes that apply)

Date: \_\_\_\_\_

Topic: \_\_\_\_\_

Purpose: \_\_\_\_\_

• Planning & Preparation:

meeting was necessary  
 alternatives were not appropriate

knew meeting purpose  
 had a game plan

• Pre-meeting Administration:

purpose/objectives clear  
 length appropriate  
 location optimal  
 only necessary participants invited

agenda distributed in advance  
 time of day appropriate  
 good seating arrangement  
 proper group size

• Meeting Execution:

reminder sent  
 purpose established at the beginning  
 encouraged participation  
 decision agreed to without a vote  
 did not bog down on a topic  
 minutes completed

meeting began on time  
 visual aids used if possible  
 discussion lively  
 discouraged meeting disrupters  
 summarized important points

• Post Evaluation and Follow-Up:

some form of evaluation used

open items closed

One thing I really messed up:

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---

One thing I did really well:

---

---

Next time remember to:

---

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**Attachment 5: Group Post-Meeting Evaluation Form**

Date: \_\_\_\_\_

Topic: \_\_\_\_\_

Purpose: \_\_\_\_\_

Use the following rating scale:      1 - Never      Or answer Yes or No  
    2 - Hardly  
    3 - Sometimes  
    4 - Usually  
    5 - Always

1. Participation was fostered.	1	2	3	4	5
2. Discussion was focused or brought back to focus when it strayed.	1	2	3	4	5
3. Discussion progressed through issues.	1	2	3	4	5
4. Only those truly necessary were invited.	1	2	3	4	5
5. Everyone participated.	1	2	3	4	5
6. Alternative views were encouraged.	1	2	3	4	5
7. Participants were receptive to other ideas.	1	2	3	4	5
8. The leader was receptive to other ideas.	1	2	3	4	5
9. The purpose and objectives of this meeting were clear and stated.	Yes	No			
10. The agenda was adequate	Yes	No			
11. The agenda was distributed in advance.	Yes	No			
12. A reminder of the meeting was sent.	Yes	No			
13. The meeting was effectively conducted.	Yes	No			
14. The meeting was effectively concluded.	Yes	No			
15. The purpose and objectives were achieved.	Yes	No			
16. Responsibility for action items is clear.	Yes	No			

### **Attachment 6: Reviewing a Past Meeting**

**Topic:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Meeting Purpose:**

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**Meeting Objectives:**

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**Type of Meeting Attended:**

- informational/training
- idea generating
- decision making
- other \_\_\_\_\_

**Was the Meeting Productive?**

- yes
- no

I was a:

- leader of the meeting
- participant of the meeting

**Was the Leader Prepared?**

- yes
- no

**Was an Agenda Used?**

- yes
- no

**If yes, was it distributed in advance?**

- yes
- no

**How Many People Were in Attendance?** \_\_\_\_\_

**Were the Right People In Attendance?**

- yes
- no

**Did it Start and End on Time?**

- yes
- no

**Did Participants Contribute?**

- yes
- no

**Was Participation Encouraged?**

- yes
- no

**Room Size**

- too big
- too small
- proper size

**Meeting Length**

- too long
- too short
- proper length

**Room Accommodations**

conducive  
 not conducive

**Were minutes completed?**

yes  
 no

**Were action items followed-up on?**

yes  
 no

**Meeting timing - good time of day?**

yes  
 no

**Was a post-meeting evaluation done?**

yes  
 no

**Could meeting purpose been achieved without a meeting?**

yes, how? \_\_\_\_\_  
 no

**How Could the Meeting Have Been Improved?**

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#### **Attachment 7: Meeting Reminder/Notice**

Date of Reminder: \_\_\_\_\_ By: \_\_\_\_\_

**Meeting Purpose:**

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**Meeting Date:** \_\_\_\_\_ **Meeting Start:** \_\_\_\_\_ **Meeting End:** \_\_\_\_\_

**Meeting Place:** \_\_\_\_\_ **Meeting Chaired By:** \_\_\_\_\_

## Participants:

**Preparation or Materials to Bring:**

If Unable to Attend, Notify: \_\_\_\_\_  
Extension: \_\_\_\_\_  
No Later Than: \_\_\_\_\_

*Thank you and see you there!*



## **Attachment 8: Essential Meeting Points**

### **Before the Meeting**

- Write out your specific purpose and objectives for meeting.
- Determine how long the meeting should last.
- Decide who you need to be in attendance.
- Pick a meeting location and reserve it if necessary.
- Schedule the meeting to best accommodate those involved.
- Prepare an agenda and distribute it in advance to all participants.
- Send a meeting reminder.

### **During the Meeting**

- Review your purpose and objectives prior to the meeting start.
- Start on time, formally begin the meeting, and explain the purpose and objectives.
- Use an icebreaker.
- Introduce the first agenda item and explain its relevance.
- Encourage participation from all members.
- Use brainstorming when necessary to gather ideas.
- Fairly evaluate all ideas regardless of source.
- Keep meeting bullies in check.
- Do not stop functional conflict.
- Bring each agenda item to closure.
- Re-cap meeting accomplishments and action-items.
- End on time.

### **After the Meeting**

- Assign someone to prepare the meeting minutes.
- Evaluate the meeting.
- Distribute meeting minutes within 48 hours.

Appendix D: Delphi Experts

1. Mr. Steve Evans  
Bank of America  
Vice President  
Residential Lending Div. Manager  
6900 Westcliff, Suite 400  
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2. Mr. Robert Dicks, Jr.  
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Appendix E: Round One Delphi Letter/Inquiry Form

28 Feb 95

AFIT/LAA  
2950 P Street  
WPAFB, OH 45433-7765

Participant's Name  
Participant's Address

Dear (Participant's Name),

Thank you for agreeing to participate in this Air Force Institute of Technology (AFIT) Delphi investigation. Part of the purpose for this research is to determine the critical elements for successful meetings and to develop a guide to instruct managers in the use of the elements. You were asked to participate in this important research because your experience and insight qualify you as an "expert" in the field of meeting management. Your comments will be combined with those of other experts through the systematic Delphi process to improve the attached meeting guide. By subjecting the guide to the critical views of experts, I hope to arrive at a consensus for what information the guide should contain.

The attached Delphi inquiry solicits your personal opinions. Please complete the inquiry and return it in the enclosed envelope within two weeks. As soon as all of the responses are compiled, a second Delphi inquiry will be mailed to you. Please save the Meeting Guide as you may wish to refer back to it when the second Delphi inquiry is made.

Any additional comments, suggestions, and ideas regarding this research are welcomed and encouraged. The last question of the inquiry is for this purpose.

If you have any questions, please call me at (513) 293-1899 (home) or (513) 255-7777 ext. 2111 (work). You may also contact me via Internet at zbelcher@afit.af.mil.

I sincerely appreciate your willingness to assist in this research effort by making room for this study in your busy

schedule. Your expertise and assistance is invaluable to me.

ZACKERY S. BELCHER, Capt, USAF  
Graduate School of Logistics and  
Acquisition Management  
Air Force Institute of Technology

Attachments:

1. Meeting Guide
2. Delphi Inquiry
3. Return Envelope

Number:

Delphi Inquiry - 1

(Please use the back of this page or separate sheets for continuation comments)

1. What information critical to the process of planning and conducting organizational meetings did you feel was **OMITTED**? Where do you think the best place for discussion of this material would be in the guide?
2. What information critical to the process of planning and conducting organizational meetings did you feel was **COVERED INADEQUATELY**? How would you recommend presenting this information?

3. What information in the guide did you feel to be **UNNECESSARY** (e.g. redundant, common knowledge)?
4. In your opinion, what sections or individual discussions **TURNED YOUR BRAIN OFF** while reading the guide? What would be a good way to improve those sections?
5. What areas **SPARKED YOUR INTEREST** in the guide and made you want to read more? Why? Should there be more emphasis placed on these areas?

6. What would you ***RECOMMEND TO IMPROVE*** this guide (formatting, organization, visual aesthetics—font, size, line spacing)?

7. In general, what are your ***OVERALL FEELINGS*** of the guide?

**8. Please make any additional comments, suggestions, and ideas which you feel could help make the guide useable and helpful to organizations.**

## Appendix F: Delphi Round One Summary

### Delphi Inquiry 1 - Compiled Expert Feedback

**Question 1:** What information critical to the process of planning and conducting organizational meetings did you feel was *OMITTED*? Where do you think the best place for discussion of this material would be in the guide?

#### Feedback:

1. A summary. Your guide could/should be identical to your meetings. Outline the purpose, develop the themes, conclude with a summary. Your points then become a living example - add a summary.
2. Why not open the guide with an affirmation that one of the primary tasks of management is to facilitate the flow of information within an organization? Meetings have traditionally been the primary means of accomplishing this task. Therefore meetings, when conducted efficiently, are a terrific management tool. I sense an immediate negative tone towards meetings as inherently a bad thing.
3. Very little was directly mentioned about the cultural value of meetings. As we enter an age of impersonal communication, the need to meet face-to-face may actually increase the value if for no other reason to see and interact directly with one another. For many persons involved in matrixed organizations connected by e-mail systems, a weekly staff meeting is the only place they can count on seeing the other members of their team.
4. How about the use of computer tools. Not everyone has access to them, but I have found that using a projection unit along with certain types of software to really improve the process of running the meeting, generating ideas, communicating important points, and summarizing results. For instance, the following activities can be accomplished collaboratively on the fly:
  - brainstorming ideas
  - review and subsequent adding/deleting/modifying a document or presentation
  - project status can be briefed and action items updated
  - updated information can immediately be distributed in paper or electronic formatsThe proper place for this may be in a section dealing with the impact of changing technologies on the flow of

information (i.e. e-mail, shared databases, groupware, scheduling systems, teleconferencing systems, etc.)

5. In the Benefits section, I understood the "time is money" argument as a benefit to the organization. But, in the section on "Benefits to the Individual" (page 4), the only benefits I found were to avoid aggravating people and to look good. I think there are probably other benefits to the individual that weren't discussed. It would seem that an individual benefit to a good meeting is that you can do your job better, by better/increased communication with your people, by identifying problems you need to fix sooner rather than later, etc.
6. I expected to see some footnoting mostly because I know that this is a research effort. This is not necessary when the purpose is solely to guide others. However, other academic types may fault you for not giving credit to those whose original ideas you drew from to create this guide.
7. Maybe a list of references or other publications was deliberately omitted because this is just a guide. But I questioned the source and accuracy of some statements and wonder where you got the numbers on hourly cost of meetings. Also, if you really motivate someone and they want to learn even more about meetings, what should they read, where should they go for information?
8. Issue Board - page 6 and page 23 - post and identify and write as items come up not relevant to agenda items at that time. Then cover issues at the end of the meeting.
9. Consensus - page 6 and page 23 - Define it (Refer to page 6 - advantages). It is: "All support, none oppose, all have been heard." It is not: "Unanimous vote, majority vote, everyone's favorite choice."
10. Team Planning Agenda - page 7 - Have the team plan the next agenda (purpose, objectives, everything for ownership and involvement). At a minimum they should contribute to preparing the agenda, not just the leader.
11. Involvement/Buy In - pages 11, 13, 18, 19, and 23. Need more reference of this!!!
12. Creativity - page 11 - who to invite - sometimes better ideas with more idea generation is critical and should be done in meetings.
13. Observer Forms - have available - rotate who takes them and show the results.
14. There needs to be a clear distinction made between the roles of "meeting leader" vs. "facilitator." Even when handled by the same person, they are distinctly different roles. Basically, the difference is one of focus and responsibility. Leader - responsible for content and outcome. Facilitator - responsible for meeting process. In many cases, these roles tend to conflict. Personally, I recommend a separate facilitator for many meetings.
15. Some discussion of ground rules in meetings would strengthen your discussion of keeping the meeting flowing, especially

regarding decision making (consensus, majority rule, the leader's decision making role, etc.)

16. Some meetings may require participant to take roles, such as timekeeper and facilitator. This makes it easier for participants to keep to the norms.

**Question 2:** What information critical to the process of planning and conducting organizational meetings did you feel was **COVERED INADEQUATELY?** How would you recommend presenting this information?

**Feedback:**

1. On page 4 you suggest e-mail as a transfer of information. Only have a meeting to develop ideas or change behavior - see your premise - only for above and never meet when a memo or e-mail would do.
2. On page 10: Have a quick 2-3 minute gathering/meeting to announce something special - promotion, goal achieved, or results strived for by all. No formal sit down - just "yell" the results and go on back to work.
3. This guide seems to focus on ad-hoc, non-recurring meetings. Most of the meetings an Air Force member attends are regularly scheduled (i.e. staff meetings, status meetings, etc.) Some specific comments regarding the unique nature of staff meetings would be valuable (i.e. maintaining progress, how to handle replacements, and developing effective systems to track status of action items).
4. The guide addressed meetings of various sizes, but I was left wondering about small meetings of less than 6 people.
5. On the chart on page 12, I think that the listed meeting types are only one example and not all inclusive. Training is just one type of meeting you have when 20-30 people are present.
6. On page 12 you talked about tools and visual aids, such as white boards, but you didn't say how or when to use them.
7. The references to TQM on pages 14 and 18 were interesting. But why was it referred to only twice? It seems that TQM aspects apply to other parts of the guide as well. Why wasn't TQM mentioned in all sections where it applies? What about the reader who knows nothing about TQM?
8. On page 18, when you start to describe everything that needs to happen in a meeting (ice breaker, introductions, closing, etc.) it seems hard to imagine more than one or two agenda items in the recommended 30 - 45 time frame for meeting length that is suggested on page 9. It leaves the reader wondering how much brainstorming or questions and answers could actually take place.

9. The section on pages 19/20 on "Meeting Bullies" was interesting. But there are other counterproductive meeting behaviors that weren't addressed that may be even bigger problems than a bully. For example, how does a meeting leader handle a person who is long winded and goes on and on with a bunch of details on a topic that is not relevant? How can he/she be stopped gracefully, without interrupting the flow of the meeting, or making others who have worthwhile things to say hesitate to share their opinions?
10. In the section about things that take place in a meeting - I would have liked to see some information on the parts of a meeting (pages 17-20) applied to the type of a meeting (page 12). For example, seems like you use brainstorming primarily in a "Problem Solving and Decision Making" meeting - or not?
11. Page 9, sentence 4, talks about building in a "small time cushion", but the Conduct of the Meeting section later on does not seem to address how to keep the meeting from exceeding its allotted time, or what to do when this happens. (Other than on page 10, which says give them a stretch break.)
12. Brainstorming Rules: 1 idea per turn in rotation, can pass, no editing, evaluating, wild ideas encouraged, no discussion during (pages 11 and 22).
13. Posting Agenda With Times: For each item for all to see on a big flip chart - makes us all responsible for progress - each can see and move us on (pages 13 and 18).
14. Code of Conduct: Page 18. Post them and get agreement from group up front. Ideally the team would select their own code - give more examples of code items. On page 20 they could be used to point out bullies because their behavior would deviate from the code. This allows the group to police themselves
15. Questioning for Involvement: Use this for wall flowers (page 22, section J). Use open ended questions.
16. Closure: Use closure by summary on each agenda item (page 23, section K).
17. Maybe on page 14 and page 24 give more information on, and techniques for, evaluations. Add ratings 1 through 10 and do it all verbally in the group for each to learn and be open. With changes, say "what can we do to reduce these next time?"
18. I would recommend more development of how to plan a meeting and what takes place in a meeting. In most general terms, meeting processes are comprised of some combination of: (1) getting/sharing information, (2) structuring information, and (3) making decisions. During pre-planning, use this model to prepare a set of processes that will achieve the selected goal(s). In that regard, I would revise the pre-planning form (Attachment 1 - Meeting Organizer) to allow the development and support of a series of steps (processes) that will lead to goal attainment.

19. Page 21: You can have dissent within the group in the meeting. However, once the group disperses, the decision made is the groups and each must own it, never saying outside the group, "Well, I didn't vote for it!"

**Question 3:** What information in the guide did you feel to be **UNNECESSARY** (e.g. redundant, common knowledge)?

**Feedback:**

1. Nothing
2. I question the need for all of the forms you included as attachments especially numbers 4, 5, and 6. They are new to me and would be viewed as time wasters by most of my peers.
3. Introduction on pages 1 through 5.
4. Page 10 - why do you recommend not having a meeting first thing in the morning or right after lunch? Why do these times interfere with productive participation?

**Question 4:** In your opinion, what sections or individual discussions **TURNED YOUR BRAIN OFF** while reading the guide? What would be a good way to improve those sections?

**Feedback:**

1. Page 9, Section F: This paragraph took me several readings to comprehend.
2. Page 14, top sentence: Talks about ensuring the items below are in the minutes. You may want to list these out in bullet format for ease of use.
3. I was turned off by the portrayal of potential meeting attendees as always hating or at least disliking meetings and considering them a waste of time. I think some people actually appreciate meetings and use them as a valuable source of communications. This guide is not only how to go from having bad meetings to good meetings. It is also useful in refining and improving what could already be good meetings and turning them into excellent meetings.
4. Your personal opinions - page 2 "my desire"; page 5 "I cannot"; page 16 "I doubt that it was"; page 25 "I feel" -- omit these.
5. Two people are needed for discussion - page 2 - discussion is not comprised of written pages (fourth line down).

6. Page 4, "get noticed" on benefits to individual - so what - accomplishments rather than hierarchy are what's important.
7. The rah-rah paragraphs on how this will help my career (page 4, Benefits to the Individual). While it is a skill that can be useful to one's career, I would prefer to see the approach be a little lower key (i.e. benefits to the individual meeting participants -- ownership, involvement, etc.)
8. Page 9, "build in time" (four lines down) - makes us expect inefficiency.

**Question 5:** What areas SPARKED YOUR INTEREST in the guide and made you want to read more? Why? Should there be more emphasis placed on these areas?

Feedback:

1. Having an agenda in writing mailed ahead of time. More leaders could do this.
2. The attachments are a nice, summarized approach for taking the contents of the guide and applying them.
3. I liked the worksheets in the back.
4. I found the information on who should attend meetings useful (page 11).
5. I was interested in the time is money information (pages 3-4).
6. The one page summary on page 34 (Attachment 8) was extremely useful.
7. Information on seating (page 12) made me stop and think. I didn't realize the significance of seating.
8. I thought comments on the value of redirecting questions on page 21 were interesting and useful.
9. Page 1, the line "cleanse the mind of status quo..."
10. Page 3, customer reference!
11. Great graphics throughout.
12. Page 8, agendas for impromptu meetings - excellent! You do a good job of participant involvement on this one.
13. Page 9, sensitivity to schedule around participants needs.
14. Page 13, the reference to "collective memory of group"
15. Page 14, wording about the actual words used in the minutes and the general section regarding meeting minutes. TQM reference was good.
16. Page 20, nice references to conflict.
17. Page 27, Meeting Agenda Worksheet (Attachment 2). The time length for each agenda item should be posted for all to see.
18. Page 29, Post Meeting Self Evaluation Form (Attachment 4). I loved the common term "I really messed up," it is so

honest! You could even have a self rating for those analytical types among us - i.e. < 10 is good.

- 19. Page 33, Meeting Reminder/Notice (Attachment 7). Listing the preparation and materials to bring is a good idea.
- 20. Page 34, Essential Meeting Points (Attachment 8). This is a great tool!
- 21. The overall concept of such a guide.
- 22. I feel the entire guide was written clearly, simply, and in a friendly manner.
- 23. I liked your attachments (worksheets).

**Question 6: What would you RECOMMEND TO IMPROVE this guide (formatting, organization, visual aesthetics--font, size, line spacing)?**

Feedback:

- 1. Page 4: Your hourly cost is clear - how about expressing in "people years" or "months of wasted time" in another chart or table.
- 2. Expand on the concept that the group owns the decision once reached and must represent it as their own to subordinates and others once the meeting is adjourned.
- 3. Page 21/22: Use questions beginning with "How, Tell, What, About, Explain". Never use the verb "to be"; you only receive yes/no answers.
- 4. Clip art has almost become passé. If you can get some professional graphic artist's help in putting together art that specifically addresses the points you are trying to make, I think this guide would stand apart from the crowd.
- 5. Although I thought the clip art broke up the text and made it easier to read, it seemed to distract me in some places, especially on pages 18, 19 and 24. That's not to say I wouldn't have appreciated more graphics or charts in the text. I would like them to contain information about ideas/concepts discussed in the text, like the chart on page 4.
- 6. On page 5 and page 20 why are your negative examples of the female gender? Need to eliminate gender in language and you will expand your positive audience reactions.
- 7. Suggest you eliminate the gender/sexist words such as "she," "her," "himself," etc. Specifically, page 5 (7th line down), page 6 (5th line down), page 20 (throughout Bully Tactics), and page 21 (4th line down).
- 8. Font and line space are fine.
- 9. Placement of graphics in the middle of works is a bit unsettling.
- 10. It seems a bit strange to see words like "... it is my desire" occasionally mixed in with a more formal type of

wording such as "the goal of this guide" or "this section focuses on..." Sometimes the author seems overly personal, at other times not.

11. Interactive: put on page 7 "What is the purpose for your next meeting? \_\_\_\_\_ Your objectives \_\_\_\_\_ Your agenda \_\_\_\_\_ etc. On the evaluation of a past meeting activity, put evaluation sheet (Attachment 6) right in text on page 16.
12. Omit references to meetings used as training - they are entirely different things (also, 6 people for problem solving and decision making meetings? I disagree. What is the source?)
13. On page 17, section 2. Rearrange the bullets for proper sequence (assign minutes should go before encouraging participation).
14. Be consistent. You used the term "leader" until page 27, then you changed to "meetings chaired by".
15. Page 28, Meeting Minutes Worksheet (Attachment 3). Add a column entitled "Decision Made By".
16. Simplify the language used throughout the guide. You could eliminate many unnecessary words making the guide shorter and easier to read.
17. Format: I had some trouble reading material in the format used. I find bullet points are easier to read.
18. Placement of "Evaluation of a Past Meeting" (page 16). If this were placed at the beginning, this could serve as a rationale for the whole guide.

Question 7: In general, what are your **OVERALL FEELINGS** of the guide?

Feedback:

1. Solid development and with a conclusion you have a publishable "How to" document.
2. Good job! Most leaders miss most of these points!
3. A solid guide that includes all the basics and a few useful additions.
4. At first I didn't like the idea of having to plow through all the other sections to get to the one on how to conduct a meeting, but I got used to it as I read through the other sections, and realized the background/planning information should come first.
5. I think your guide clearly shows the results of a lot of research and time. You can be proud of your work. I look forward to seeing the final product.
6. Overall, I thought it was a very good guide to having meetings. I have been involved with meetings for over 15

years and there were still some things that I learned from the guide and have actually put into practice to improve my meetings. I found the guide held my attention and was easy to understand.

7. I personally cannot use this guide at my company because of all the references to positional power - we are trying to use self managed work teams.
8. Very detailed, but will people read the whole thing?
9. Overall, a good idea and well done.

**Question 8:** Please make any additional comments, suggestions, and ideas which you feel could help make the guide useable and helpful to organizations.

Feedback:

1. Page 11: How are "who to invite" and "how many to invite" really different? Do you want decision makers instead of quantity?
2. Page 13 and others. What are the writer's experiences, good and bad, in practicing these ideas?
3. A few typos need to be corrected. Page 8, Section 2D(1), 6th line, "activities to which". Page 13, Section 3A, 8th line, "individual" is singular while "they" is plural. Page 17, Section 2, 5th line, "seven" should actually be "six".
4. Ownership of meetings should belong to the team - not just the leader - isn't the group ultimately responsible?
5. Why do only managers have the discussion on page 1? What is "office symbol" on page 27?
6. Why are meetings a plight - what about group learning, group decision making, advantages of involvement, synergy, creativity?
7. Instead of assigning minutes on page 13, why not ask for volunteers. It promotes involvement and builds skills.
8. Gatekeeping - page 20 (Bullies) and page 19 (wall flowers). Can be done with hands too - physically pull people in and physically stop them. You can also use facial gestures. All meeting participants can and should gatekeep.
9. Page 30. Group Post Meeting Evaluation Form (Attachment 5). Add an item 17 - "My conduct and participation in this meeting was helpful to the group."
10. Page 31, Reviewing a Past Meeting (Attachment 6). Add how on participation encouraged and why on meeting length and why/why not on productive and lessons learned.

Appendix G: Round Two Delphi Letter/Inquiry Form

5 April 1995

AFIT/LAA  
2950 P Street  
WPAFB, OH 45433-7765

Participant's Name  
Participant's Address

Dear (Participant's Name),

Thank you for completing the first round of this Air Force Institute of Technology (AFIT) Delphi investigation. To jog your memory, part of the purpose for this research is to determine the critical elements for successful meetings and to develop a guide to instruct managers in the use of the elements. In round one you were asked to provide feedback on the draft version of the Air Force Guide For Effective Meeting Management. Your comments were of great value.

In this second round, I have included the summary results of the first round -- the comments from all seven experts. Following the summary results is the second Delphi inquiry. Please complete the inquiry and return it in the enclosed envelope within two weeks. You do not need to return the summary. This will conclude your involvement in this research and unless you desire otherwise, you will receive a complimentary copy of the completed thesis (including the guide) in August.

Any additional comments, suggestions, or ideas regarding this research are welcomed and encouraged. The last question of the inquiry is for this purpose.

If you have any questions, please call me at (513) 255-7777 ext. 2111 (work) or (513) 293-1899 (home). You may also contact me via Internet at zbelcher@afit.af.mil.

I sincerely appreciate your willingness to assist in this research effort by making room for this study in your busy

schedule. Thank you again for sharing your expertise; it is invaluable to me.

ZACKERY S. BELCHER, Capt, USAF  
Graduate School of Logistics and  
Acquisition Management  
Air Force Institute of Technology

Attachments:

1. Round one feedback summary
2. Delphi Inquiry 2
3. Return envelope

Capt Zac Belcher

Number: \_\_\_\_\_

**Delphi Inquiry - 2**

(Please use the back of this page or separate sheets for continuation comments)

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1. Having read the comments of the other experts, what comments do you most **AGREE WITH?** Identify by question number and feedback number (e.g., for Question #2, Feedback #9, write Q2F9). Beside the number please add any of your own thoughts.

2. Now, what comments do you most **DISAGREE WITH?** Identify by question number and feedback number. Why?

3. What **CHANGES** do you believe are the **MOST IMPORTANT** to be made in the guide to maximize its usefulness for managers of all organization sizes?
4. Have you **CHANGED YOUR MIND** regarding any of your comments from the first round? If so, which ones?
5. Please make any additional comments, suggestions, and ideas which you feel could help make the guide useable and helpful to organizations.

Appendix H: Delphi Round Two Summary

**Delphi Inquiry 2 - Compiled Expert Feedback**

**Question 1:** Having read the comments of the other experts, what comments do you most **AGREE WITH?** Identify by question number and feedback number (e.g., for Question #2, Feedback #9, write Q2F9). Beside the number please add any of your own thoughts.

Feedback:

1. Q1F1 (3) Absolutely correct.
2. Q1F2
3. Q1F3 (3)
4. Q1F4 (3) The use of computers will become very important in the future, as an aid to meetings. Special tools will increase productivity and allow for meetings with remote locations. So, I agree with this comment.
5. Q1F5
6. Q1F6 (2) Agree with the need to either comment on or include references.
7. Q1F7
8. Q1F8 (2) Not a bad idea. Our group always has a lot of issues, and we are always searching for ways to identify and improve them.
9. Q1F9 (2)
10. Q1F10
11. Q1F11
12. Q1F13
13. Q1F14 (2)
14. Q1F15 (4)
15. Q1F16 (2)
16. Q2F3 (4) Agree that information on staff meetings would be useful. Accountability keeps people moving - elaborate on the tracking method, most of us do not have this skill.
17. Q2F5
18. Q2F9 (3)
19. Q2F10
20. Q2F12
21. Q2F13 (2)
22. Q2F14
23. Q2F17
24. Q2F18
25. Q2F19
26. Q4F3 (3)

27. Q4F4 (2)
28. Q4F6 (3) Agree. The tone of the writing, negative about meetings, not really stating benefits fully is something that could be improved.
29. Q4F7 (4) Same as Q4F6.
30. Q4F8
31. Q5F12 (2)
32. Q5F17
33. Q5F23 Agree. I generally agree with most of the comments in this section.
34. Q6F4
35. Q6F5
36. Q6F6 Once again, tone of paper might be a bit negative, assume some of your readers (at least) might like meetings!
37. Q6F7 Generally agree with avoiding gender references if you can.
38. Q6F10 (2)
39. Q6F12
40. Q6F14
41. Q6F16
42. Q6F17 (3)
43. Q6F18 (2)
44. Q8F5 It is true that people who are not in the military might not know what an office symbol is.

**Question 2:** Now, what comments do you most *DISAGREE WITH?* Identify by question number and feedback number. Why?

**Feedback:**

1. Q1F9 Didn't understand the comment. Don't think I agree with it.
2. Q1F10 Who does agenda planning depends on the particular needs of the process. Sometimes, I recommend leaders, other times, the group.
3. Q1F12 I thought creativity and brainstorming were adequately addressed.
4. Q1F14 This is too much time, money and resources to do what this feedback comment says.
5. Q2F1 Don't understand the point of this comment.
6. Q2F2 Feel this type of meeting is disruptive, and not practical for groups located in different offices. Also, do not understand purpose or what this activity would gain.
7. Q2F7 TQM raises too many negative connotations. Use the principles but do not mention the name.
8. Q2F12 If ideas must come in turn by rotation there is too much pressure and eliminates spontaneity. Eliminate rotation.

9. Q2F15 Wall flowers are not particularly willing to answer questions. This comment may not work.
10. Q2F18 This comment seems to ask for things that I think already exist in the paper.
11. Q2F19 You cannot control people's thinking or force them to be loyal. I got the idea that this question seems to imply people had better agree with everything the group decides. This doesn't seem very realistic.
12. Q3F2 The forms are one of the most practical and helpful aspects of this guide (especially for someone new to organizing meetings).
13. Q3F3 I liked some of the introduction on pages 1-5 and would not take it out.
14. Q4F5 Didn't understand this comment.
15. Q5F15 Don't think references to TQM, was good for someone that doesn't know what it is, or someone who's company supports another method of management.
16. Q6F4 Leave the clip art graphics as graphic artists are expensive!
17. Q6F16 I liked the tone and language. I do not think it needs simplification.
18. Q7F8 I think someone interested in meetings would probably read the whole thing.
19. Q8F2 I wouldn't care that much about "the writer's" experience. It is only one person and not representative.
20. I would change the emphasis away from tailoring the guide for managers only.

Question 3: What **CHANGES** do you believe are the **MOST IMPORTANT** to be made in the guide to maximize its usefulness for managers of all organization sizes?

Feedback:

1. Some modification of negative tone, more statements on benefits of good meetings, possibly add brief list of references and a section on computer technology to support meetings.
2. Re-consider its tone. While meetings can be ineffective and unpleasant, it doesn't help to dwell on that. Take a more positive, professional approach.
3. Proof-read for tone, wordiness, etc.
4. Change throughout for anybody. Not just managers lead meetings and they shouldn't be the only ones to lead meetings. We have to "grow" everybody.
5. Make changes that "cut to the chase" and make the meat of this document really stand out. Don't try to cover

everything. I agree with the comments about bullet formatting and practical worksheets and checklists. Provide additional details or references in the appendix if the reader wants more information but keep the crux of this guide oriented to a reader who is already time-strapped and looking for something they can quickly digest and put to use (80/20 principle).

- 6. Provide some bulleted points for creating a meeting. It comes off as pompous to say that the reader must read everything.
- 7. I believe that a section specifically dealing with ideas on how to use information technology will make this guide relevant to managers who have yet to grasp the fact that they are living in an entirely new management paradigm.
- 8. From a personal point of view managers, if they are good, do manage, but a leader causes people to reach goals and objectives. Managing is boring, leading is dynamic. Maybe all references to managers need to be "leaders" like Q1F14.
- 9. Don't forget a strong summary or conclusion! Q7F1.
- 10. Q1F1
- 11. Q1F7
- 12. Q1F14
- 13. Q2F3
- 14. Q6F10
- 15. Q6F14
- 16. Q6F16
- 17. Q6F17
- 18. Q6F18

Question 4: Have you **CHANGED YOUR MIND** regarding any of your comments from the first round? If so, which ones?

Feedback:

- 1. Not really.
- 2. Cannot think of any.
- 3. No changes.
- 4. No.

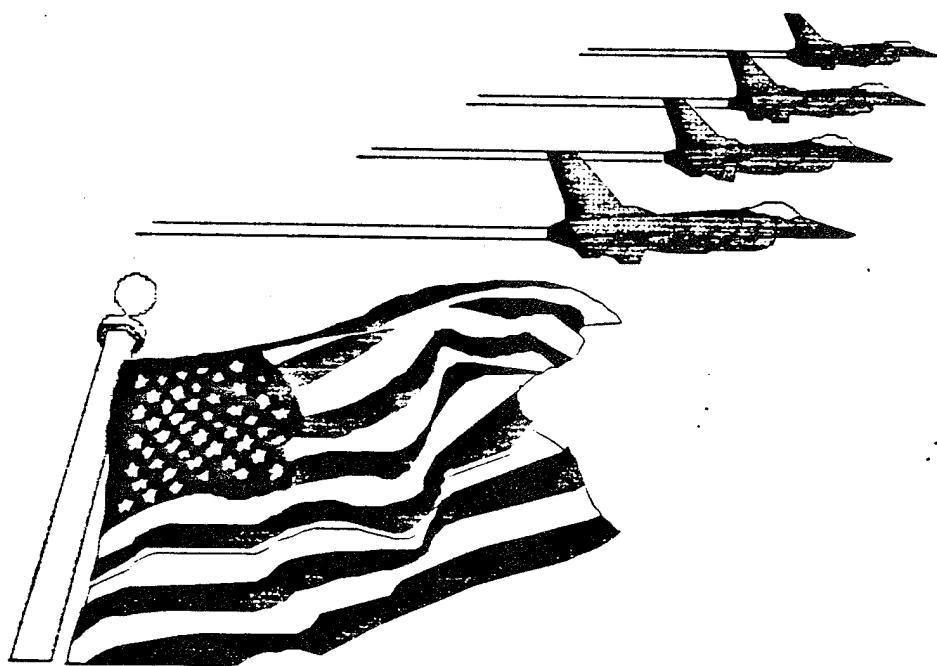
**Question 5:** Please make any additional comments, suggestions, and ideas which you feel could help make the guide useable and helpful to organizations.

**Feedback:**

1. None.
2. Keep up the wonderful work.
3. Maybe your guide could have two versions: one with clip art and one without! Q5F11 versus Q6F4.
4. Overall, it needs to be tightened up to reduce negative bias. For example, on page 6 you state that meetings should only be held if they are necessary. A better criterion would be if it is the best choice among alternatives.
5. More white space.
6. Could you do a one page - bullet point summary - maybe even laminate it as a reference to keep in top desk drawer? Each person's comments reflect his/her personal style and experience. A lot of these feedback comments, in my opinion, should be viewed from that light. Your audience may see things differently than those of us reviewing the guide.

Appendix I: Final - Meeting Management Guide

An Air Force Guide For Effective Meeting Management



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## INTRODUCTION

A primary task of managers is to facilitate the flow of information within organizations. Meetings are one of the basic tools used to transfer information and have traditionally been the principle means of accomplishing this task. Meetings are held to distribute information, to gather information for decision making, to make decisions, and to train organizational members. Interestingly enough, attending and leading meetings are some of the most time-intensive activities for which a manager is responsible, not to mention some of the most frustrating. As a manager, one can expect to easily spend 50% of each day involved in meetings. As a line employee, the portion of each day spent in meetings can approach 20%.

On a national scale there are approximately 17 million meetings conducted each day in America. Survey results reveal that up to 75% of these meetings are a waste of time for half of the total meeting duration. This means that many American organizations are facing a massive source of unproductivity and are improperly using resources. Since organizational meetings are such a tremendously common activity, why are they often ineffectively run, rarely accomplish their objective, and give birth to other fruitless meetings? The simple answer is that we, as organizational members, are not trained in the proper meeting management skills, do not take it upon ourselves to develop our skills, and generally accept unproductive meetings as a part of the daily routine.

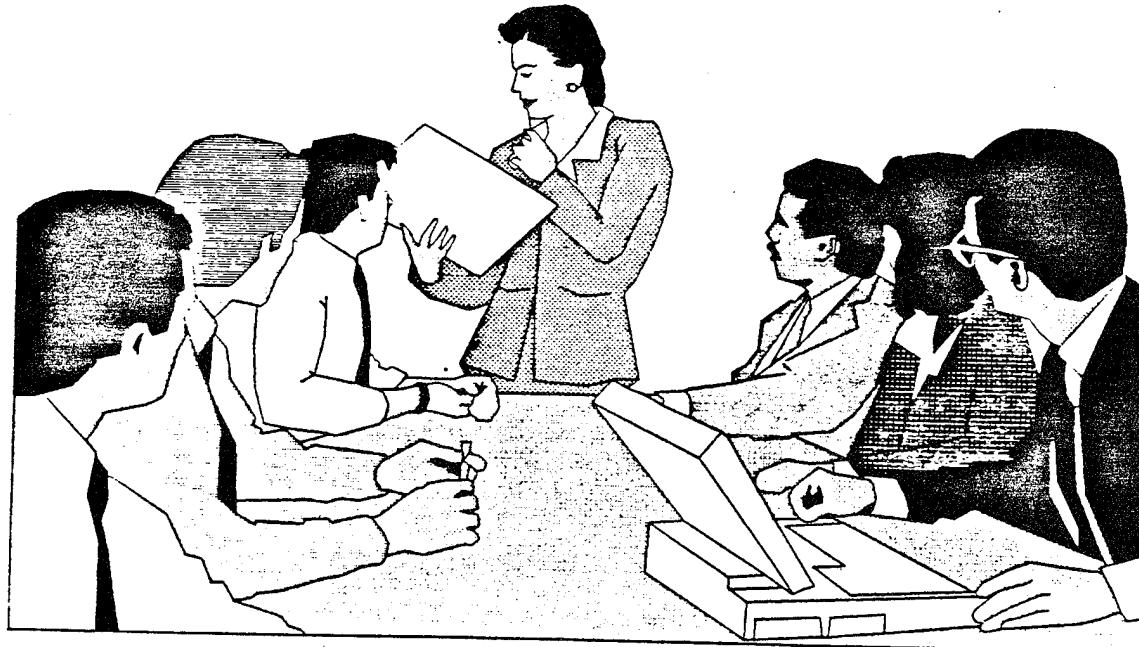
## OBJECTIVE

The objective of this guide is to reverse the course of unproductive meetings by providing organizational members and leaders the essential information necessary to conduct efficient and effective meetings. However, the information included in this guide is only as helpful as the reader chooses to make it. It is important to read this document as a whole in order to cleanse the mind of the status quo and to take on the proper mindset of change, responsibility, and purpose. Once this change in mindset is complete, the reader is prepared to delve into each section. Only through self-analysis, deliberate application, and constant focus will these principles embed themselves into

actions and results. This is not an easy task, but the achievable benefits will truly make the effort worthwhile.

## OVERVIEW

Now that the objective driving this guide is clear, along with the reason for its need, it is proper to discuss organization – the road map. First, we will begin with a discussion of the benefits to both the organization and the individual of learning effective meeting management skills. Second, an in-depth discussion of the basic elements of any meeting and those elements critical to success will be presented. Next, we will progress to examine a past meeting where you were a participant. The purpose of performing the past meeting evaluation is so that you may see how the majority of meetings do not properly include the basic elements of a quality meeting. Fourth, we will discuss in detail how to conduct an organizational meeting to include sample forms and worksheets to make meeting execution simpler. Finally, this guide is concluded with a short summary.



## BENEFITS OF HAVING EFFECTIVE MEETING SKILLS

The goal of this guide is to teach managers how to better conduct meetings so that their organization can improve its use of resources and improve its efficiency of operations. Along the path towards reaching this goal, it is important for managers to realize there are many personal benefits to reap as well as organizational benefits.

**1. Benefits to the Organization.** As previously mentioned, managers and workers alike routinely face a significant portion of each day involved in organizational meetings. When meetings are unproductive, inefficient, or unnecessary, the time of those attending is wasted. The wasted time could have been spent more productively in another capacity as determined by the individual and the particular pressures faced that day. Further, in many organizations associates are connected and operate through e-mail systems with very little personal contact. Productive meetings provide associates one of the only available opportunities to interact with each other in a meaningful manner. *Therefore, effective meetings make better use of peoples' time and provide opportunities for meaningful interaction.*

Wasted time is not the only result of poorly run meetings. People naturally grow irritable, angry, and dissentious when their time is controlled by others, especially when it is in a manner that they feel is unproductive. In addition, a side-effect of meetings is that they deny customers, subordinates, and supervisors access to the attendees for the duration of the meeting. As a result of unproductive meetings employees are disgruntled, peers are unhappy, and customers feel support for their needs is missing. *Likewise, the benefits of effective meetings are the reduction of these problems.*



Time is money. Organizations, the Air Force included, pay their employees to perform tasks that contribute to the organization's success. These tasks may include strategic planning, marketing of the services the organization offers, executing the organizational mission, or simply answering the telephones. Regardless, wages are compensation to the employee for their time. It does not matter whether employees are salaried or hourly, they are still paid in proportion to the value of their labor to the organization. Unfortunately, when unproductive meetings absorb significant portions of our week, we simply accomplish less. While many managers

recognize the time costs of hourly employees, few understand the true time costs of salaried employees. Because we frequently overlook the dollar value of time in combination with conducting inefficient meetings, our meetings are often not efficient users of organization resources. *Therefore, as organizations learn how to better run meetings, organizational resources are more likely to be used efficiently.* For support, take into consideration this table which factors in the salary and fringe benefit costs of employees:

#### HOURLY COST OF MEETINGS

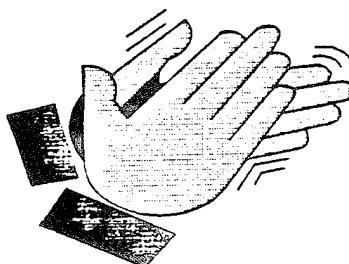
Annual Salary					
	2	4	6	8	10
\$50,000	\$96	\$192	\$288	\$385	\$481
\$40,000	\$77	\$154	\$231	\$308	\$385
\$30,000	\$57	\$115	\$173	\$231	\$288
\$20,000	\$38	\$77	\$115	\$154	\$192
Number of Attendees					

**Example:** Consider a typical weekly staff meeting of 10 people who each have an average salary of \$40,000. The duration of the meeting is usually one hour and is held 50 times a year. As reported earlier, up to 75% of meetings are a waste of time for half of their total length. Therefore, the annual cost to the organization of resource misuse of such a staff meeting is \$9,625 (.5 x 50 x \$385). This results in \$9,625 worth of misused time! Additionally, many weekly staff meetings are not necessary in the first place. The transfer of information could more effectively take place via e-mail! While managers would never waste such a sum of money on unnecessary equipment, or out-of-date technology, they habitually waste equivalent amounts of time and money on meetings. Now, how many meetings do you attend each week and what portion of each meeting is productive and beneficial to you? Through such an analysis it is

*relatively easy to see that a benefit to an organization when meetings are effective and efficient is the reduction of waste.*

**2. Benefits to the Individual.** Having discussed the benefits to an organization from conducting productive meetings, there are also significant benefits available to the individual who conducts effective meetings. Because so many meetings are recognized as a waste of time, when someone happens to attend a meeting that is well planned, has a specific objective, is conducted efficiently, achieves the objective, and is concluded on time, that attendee forms a positive opinion of the meeting leader. Subordinates and peers soon recognize the individual and begin to happily attend her meetings as well as attempt to emulate her skills. Their willingness to attend infects their behavior and they become better meeting participants. Perceptive senior managers soon hear about the manager and their opinions of the individual rise as well. What was just described is one way we, as individuals, can benefit from using effective meeting management skills.

However, there are other personal benefits of conducting productive meetings. First, effective meetings help result in positive outcomes. Leaders in such situations can take pride in the outcomes and for their involvement in those outcomes. Second, participants grow professionally and personally through effective meetings. Participants grow professionally as they become meaningful participants offering ideas and working towards solutions. Further, by having a voice in discussions participants develop ownership and satisfaction with decisions. Moreover, by seeing effective meeting skills in action, participants learn first hand how meetings are supposed to be conducted. Participants grow personally by gaining valuable self-confidence through their involvement and sharing of ideas. Third, by improving communication with peers, problems can be identified and addressed earlier. This results in improved job performance and fewer fires to extinguish.

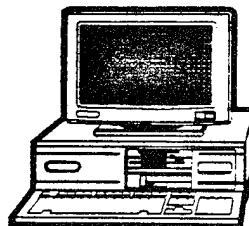


## **ELEMENTS OF MEETING SUCCESS**

It is hoped that at this time you are sufficiently motivated to read the remainder of the guide with care. This section will present the essential elements of meeting success.

**1. Proper Meeting Reasons.** When a person is considering holding a meeting, the individual should first ask himself whether a meeting is really necessary; "Why do I want to hold a meeting?" Is a meeting the only way to get across the ideas or to accomplish the purpose? Could you use:

- \* an e-mail message
- \* voice-mail message
- \* series of telephone calls
- \* personal visit, or
- \* memorandum



to accomplish the same result in a more efficient manner? You should be conscious of the time costs and morale implications of holding meetings when they are not necessary and when an alternative would fulfill the objective.

To assist you in deciding when a meeting is appropriate, it is important to remember that meetings should take place only when group interaction or exchange is essential. Such circumstances include some forms of training meetings (how to make the most from a new software tool); when you need to gather information for decision making, especially when the decision impacts several groups (re-organizing functional areas along a matrix structure); when you are seeking out upward communication (want to make yourself available to subordinates and to address any concerns they may have); and for communicating progress reports that impact more than one group. Whatever the general purpose for the meeting, it is imperative that if a meeting is held, that it does not deal with areas or topics beyond the initial scope. If there is need to delve into other areas, that should be done through a separate activity.

Routine staff meetings are in a league of their own. While the sense of team unity and information exchange that result from staff meetings are important, staff meetings themselves are quite often the most flagrant violators of wasting the time of participants. In many staff meetings leaders use the gathering of personnel to

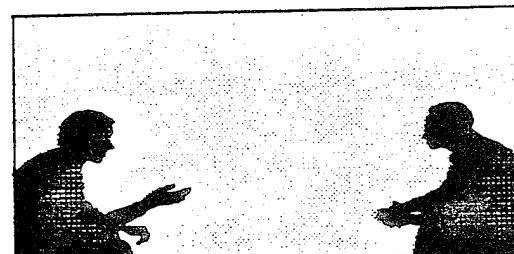
disseminate information (which e-mail is more efficient for), to delegate additional duties (e-mail, again, is better suited for this as are second level supervisors), and for a host of other purposes. In reality, staff meetings as we know them should be eliminated and replaced with purposeful meetings. The organizational culture and exchange of information can still take place in purposeful meetings without the wastefulness of the traditional staff meeting.

**2. Pre-Meeting Planning and Administration.** After determining a meeting is appropriate, nail down the specific purpose and objectives for the meeting, prepare an agenda, schedule the meeting, choose participants, and reserve a room. These same principles apply for recurring meetings, too.

**A. Know Your Purpose.** This is where you ask yourself, "What exactly do I want to achieve?" For example, if the answer is to gather information to assist in a decision you need to make, then the rest of the planning should have this as the focus. Further, this example of gathering information would be a good purpose, provided the information could not be gathered through another forum.

**B. Establish Objectives.** Once the purpose is set, specific objectives need to narrow the focus to identifiable and concrete actions. If the purpose is the example above, then sample objectives would be to outline the negative aspects associated with a proposed solution, the positive aspects, and the implications of not making a decision at all. With the knowledge of the purpose for the meeting and the objectives to achieve, you then know what constitutes a completed meeting -- the accomplishment of the objectives!

**C. Document the Purpose.** As was once told to me by a sage old Technical Sergeant, "information stored in the head is worth as much as a blank piece of paper." It is now time for you to write out the meeting purpose, preferably in one sentence. The physical existence of the purpose statement serves to focus group efforts and is especially effective as a tool to guide the meeting group. In addition, the purpose statement is quite appropriate at the top of the meeting agenda where it is plainly visible to all. To



maximize this effect, begin each meeting by reviewing the purpose and pointing out where it appears on the agenda as the guiding direction.

**D. Agenda.** A meeting agenda provides direction for the meeting and therefore needs to be carefully prepared. The agenda narrows the focus of the meeting to certain topic areas within the domain of the purpose statement. It specifically spells out:

- \* what the meeting will cover
- \* in what order
- \* at what time
- \* on which date
- \* where, and
- \* who will be in attendance

Distributing the agenda in advance to those who will be participating is important so that they are able to prepare properly for the meeting. For instance, if the agenda for a managers' meeting indicates the authorization of additional funding to hire a new employee, then each manager can prepare his case and come armed with support. At a minimum, participants should receive the agenda a full day before the meeting.

Attachment 1 *Meeting Organizer* helps the meeting leader in initial meeting planning and later is helpful when actually creating the agenda and conducting the meeting.

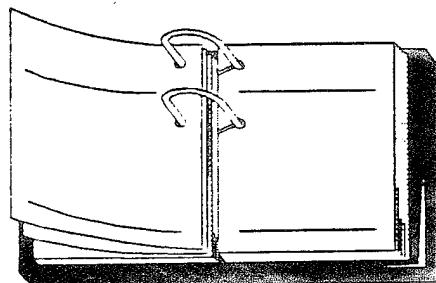
Attachment 2 *Meeting Agenda Worksheet* is an example of how to format an agenda.

Agendas are traditionally prepared solely by the meeting leader. However, agendas can also be prepared by the team for upcoming meetings during the existing meeting. Using the team approach helps emphasize the importance of the purpose and objectives and also assists in process ownership.

**(1) Agendas for Impromptu Meetings.** Some mistakenly believe an agenda only applies to meetings planned in advance, such as staff meetings, and that impromptu meetings do not need an agenda. Such an idea is far from the truth. In fact, impromptu meetings stand to benefit from agendas as much as any other type of meeting. This is true because hastily arranged meetings take the participants from other important activities to which the participants are anxious to return; the participants want to achieve the objective quickly and get back to work. Accordingly, participants need to know specifically why they are meeting and what needs to be accomplished.

from the meeting – the purpose! Often the leader in such meetings assumes everyone's focus is properly on the purpose and launches directly into the meeting. This results in floundering by the group, wasted time, and ultimately, frustration. To prevent such happenings, quickly sketch out the purpose for the meeting and the topics to discuss either just before everyone arrives, or at the beginning of the meeting, with the help of the participants.

**E. Issues to Cover.** Integral to preparing the agenda is determining what issues to cover and how long the meeting should last. Optimally, you would determine the length solely on the amount of truly necessary material to cover. Unfortunately, the decision also must consider real world constraints, such as the other activities each participant must attend to, the attention span of participants, the time of day the meeting will take place, and the size of the group. In addition, most tasks take longer than originally planned. Therefore, a small time cushion should be built into the meeting length. Beginning with the material to cover, be realistic and realize there usually is not time to discuss each aspect of an issue in extreme detail, and therefore decide upon only those aspects that are essential.



**F. Scheduling.** Most people have very busy schedules and resent activities that interfere with the accomplishment of their work. Sadly, meetings are often viewed as interference. Accordingly, make your best effort to work with the schedule of each participant to find a convenient

time for the meeting. When you do make the effort to schedule the meeting in such a manner your actions are noticed by the participants; this serves to start the activity on the right foot. People need to visually see others care about them and their needs. In this case the caring centers around the time of each individual, something that each holds to be quite valuable. Unfortunately, sometimes this cannot be done and you must choose the time that interferes the least for the majority of participants. Closely tied to the idea of scheduling is the issue of how long a meeting should last so that it does not exceed the attention span of the participants.

**G. Meeting Length.** Some believe that as we mature our attention spans increase. This may be the case when comparing a child to an adult, but at some point it becomes relatively fixed. Studies show that meetings extending beyond 60 minutes tend to lose the interest and attention of those involved. In reality, conducting meetings 30-45 minutes in length is closer to the optimal duration. As further support for keeping meetings brief, keep in mind *Parkinson's Law*, which states that work expands to fill the time available. If the meeting will consume whatever amount of time is allotted, you might as well minimize the potential for wastefulness and make the meeting a short one. However, if for some reason your meeting does need to extend past the hour mark, include a few minutes for a short stretch break. Such a break will refresh and energize participants so the remaining time can be more productive. With this information the meeting leader also needs to consider the impact that various meeting times have.

**H. Time of Day.** There are different views regarding what time of day a meeting should take place with some advocating breakfast or lunch meetings, others desiring meetings just before lunch or quitting time, and the conventional approach of meetings somewhere during the course of the regular work day. Meetings held over meals often ensure brevity and provide a form of social bonding. I once had a commander who held staff meetings over lunch once a week at the Officers' Club. While the meetings were fairly brief, participants were often distracted because they were trying to eat their meal. As a result, most of us would order food that was user-friendly (required little chewing) and less than satisfying. In this particular case the commander had a secondary goal and that was to support the Officers' Club. Thus, meal-time meetings are usually not the most effective in themselves, but often help to achieve secondary objectives.



Meetings held just before lunch or quitting time are also usually brief and to the point. However, if participants come to believe their personal time is being wasted, or withheld, they may become uncooperative. Thus, think very carefully before scheduling meetings just prior to lunch or quitting time. Even though such an idea may seem attractive, you should be wary of the possible negative consequences.

The conventional meeting is held at any time during the work day excluding meals. If you choose this route, try to not schedule the meeting for at least 60 minutes after people arrive in the morning or return from lunch. Your objective is productive participation and both of these times interfere with that objective because people are still settling into their work routine.

I. Number of People. As the number of participants increase, the quantity of conversation also increases; this includes both relevant discussion and distracting discussion. With fewer members it is easier for the meeting leader to keep the meeting on track and moving forward. With large groups the members are more likely to become bored, distracted, and actually interfere with progress.

(1) Who to Invite? How does one decide who needs to attend a meeting and how many people to invite? Only invite those that have a reason to attend based upon the meeting purpose and objectives. Such individuals are those whose cooperation or support is needed, those who have decision making authority that you need, and those who have information or skills that are necessary for successful implementation. The tendency is to invite extra folks to ensure that nobody is forgotten. This is a mistake; having unnecessary meeting participants is a waste of their time. Further, people not critical to the achievement of the purpose often end up being distractors – making impertinent comments, expressing non-verbally that they do not want to be there, and getting up and leaving. Also, avoid inviting those individuals that “are always invited.” If candidate participants do not have a solid reason for attending, do not invite them.

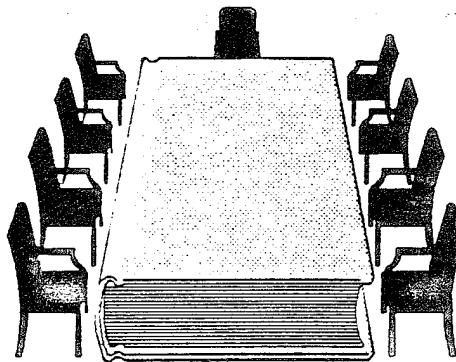
(2) How Many to Invite? Group size bears on the effectiveness of any meeting. If too many are present, the meeting will degenerate. If too few are present, there may be folks missing that are necessary for accomplishment of the purpose. The meeting leader needs to balance group dynamics with effective meeting execution. As individuals are exposed to large groups our willingness to contribute meaningfully decreases. As group sizes increase we lose confidence, fear rejection, and withdraw into ourselves. The opposite usually occurs with small groups. Therefore, it is rational to say that the smaller the group the better the interaction and exchange.

In addition, large groups are often inefficient users of time because some members need background information explained, it is harder to progress through the agenda, and misunderstandings occur. Often meeting leaders prefer smaller groups because they are easier to lead and focus. To specifically answer the question of how many participants to invite, past research has shown the number of people is dependent upon the meeting type. Please refer to the following summary table for a quick re-cap.

#### PEOPLE FOR MEETING TYPES

MEETING TYPE	NUMBER OF PEOPLE
Problem Solving & Decision Making	6
Training	20 to 30
Informational	As Many as Can Fit in the Room

J. Meeting Room Specifics. Choosing the location and arrangement of a room to hold the meeting is also important. The room should not be too small, nor too big; there should be enough room for each person without crowding, yet not significant left-over space. The lighting should be bright and even, the temperature should be comfortable, and the room should be relatively insulated from both outside noise and from allowing the conduct of the meeting to be heard by those outside the room. If at all possible there should be a door into the room to close for both privacy and to reduce distractions. If special equipment is necessary, such as white boards for documenting ideas and brainstorming, they should be in the room and ready to use before the meeting begins. This means the board is clean and there are markers and an eraser. The chairs should be comfortable without being too relaxing.



Seating involves strategy. Since most meeting rooms include a table, where should you sit? It really depends on the amount and type of information exchange you are trying to foster. Sit at the head of the table to confer power, position, and one-way information flow, or in the middle to express open exchange, participation, and equality. Is a rectangular or circular table

better? Again, this depends on your personal desires. A rectangular table implies information flowing from you, while a circular table suggests information cross flow. Whatever the physical arrangement, never allow empty seats between individuals. In this manner open spacing serves as a physical barrier between participants and their communication with each other.

#### Choosing a Table and Where to Sit

SEAT YOURSELF	TABLE TYPE
Head of Table - confers power, position, and one way information flow.	Rectangular - establishes information flowing <u>from</u> you.
Middle of Table - encourages open exchange, participation, and equality.	Circular - establishes information cross flow between participants.

When you arrive at this point while planning an actual meeting you should take a few minutes to complete a worksheet similar to that in Attachment 1 *Meeting Organizer*. This helps you to document and crystallize your thinking on subjects discussed so far: purpose, agenda, time, participants, and location.

**3. Post-Meeting Activities.** The third critical element to meeting success is that which takes place after the meeting, the post-meeting activities. At this point we are purposefully skipping how to actually conduct an efficient and effective organizational meeting in order to express the final elements for success. Once these are behind us, we will delve into meeting conduct. There are three sub-elements for

the meeting leader to keep in mind: meeting minutes, post-meeting evaluation, and follow-up of action items.

**A. Meeting Minutes.** Meeting minutes are the documented record of the discussion, decisions, and action items from a meeting. They are useful to keep non-participants, or participants who could not attend, apprised of meeting happenings, as a record of what transpired, as a tool for tracking required actions, and as a collective memory for the group. It is your duty to either secure a volunteer or assign someone the responsibility for preparing the minutes. Since most meetings do not have the luxury of a meeting secretary, that responsibility must fall on the shoulders of one of the participants. It does not matter who the individual is, as long as the individual is competent, thorough, and dependable. Some believe the meeting leader should prepare the minutes because no one else is as concerned with the success of the meeting as the leader. Others counter that the leader usually has too many other activities going on to plan, conduct, and prepare the minutes for the meeting.

**(1) Contents of Minutes.** Regardless of who prepares the minutes there are certain items the minutes should contain. It is your responsibility, as the meeting leader, to ensure the below items are in the minutes. If they are not, work with whomever prepares the minutes to rectify the situation. By attaching a copy of the agenda to the minutes the time, date, purpose, participants, and location are known. All that is left is for the preparer to capture the significant views, decisions, and other outcomes for each topic. The preparer needs to take special care to reflect comments and decisions in the actual words used in the meeting, as to avoid later confusion. The minutes should not contain the verbatim comments as that would be cumbersome and not relevant. Special attention is necessary for action items to reflect who is responsible, what is to be done, and when it is to be accomplished; this will assist in follow-up. This also prevents individuals from later claiming they did not know they had an action item when the minutes specifically so state.

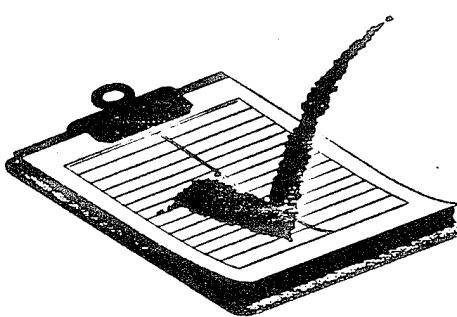
Minute Elements	
Date	Purpose
Participants	Location
Significant Views	Decisions
Outcomes	Action Items - Who and When

(2) Minutes Suggestions. Suggestions when preparing the minutes are to jot down notes beside each agenda item on the agenda itself, to use a flip chart, or to use a minutes worksheet similar to that in Attachment 3 *Meeting Minutes Worksheet*. Another option is to have the leader create an expanded agenda that includes several blank lines between topics for the preparer to write notes. These notes can then be formalized into minutes within 24 to 48 hours following the meeting and distributed to participants. If it happens any later, people will forget what took place. Further, policy should allow participants to provide corrections to the minutes when they are in error. Revised minutes should be sent back to each participant and filed with past meeting minutes.

B. Post-Meeting Evaluation. Organizational processes can be improved through evaluation and change. The belief is that improvement of processes results in greater efficiency and effectiveness and helps the organization. Meetings are processes and therefore require the same evaluation for improvement. Evaluation after each meeting should be done by you, as the meeting leader, at a minimum. To help you evaluate your own meeting there is a self-evaluation worksheet in Attachment 4

#### ***Post-Meeting Self-Evaluation Form.***

Optimally, participants in the meeting will also assist in the meeting evaluation to bring out strengths, weaknesses, and areas for improvement. To facilitate feedback you can use group evaluation forms to make providing feedback easier, such as in



Attachment 5 *Group Post-Meeting Evaluation Form*. Alternatively, you can ask for verbal comments at the end of a meeting. If you ask for verbal comments, be sure to not take the comments personally while at the same time encouraging the group to critique the meeting as a distinct event. One way this can work is for each person to state at least one thing that went well in the meeting and one thing that did not go well. Some believe that getting written feedback is best but this must be balanced with the fact that people are less likely to spend quality time on such a task as there are other tasks to perform. Therefore, it is probably best to choose an evaluation approach that is the least painful for the members to comply with.

**C. Action Item Follow-Up.** Finally, since many meetings include the assigning of action items or tasks, you must perform follow-up on these activities to ensure their accomplishment. Meetings are held to accomplish an objective, and if the tasks are integral to the success of a project, the non-accomplishment of the tasks hurts the organization. Further, non-accomplishment destroys any gains made by an otherwise productive and efficient meeting. Therefore, meeting leaders must require accountability of participants in accomplishing action items. An example of how this can be done is to have the accountable person give an update at a future meeting. In this manner, updates can become a topic in future meeting agendas. Another method is for meeting leaders to require periodic progress reports with time frames established before the close of the meeting and documented in the minutes.

## EVALUATION OF A PAST MEETING

So far you have read about the necessary activities for meeting success without having had any discussion on how to conduct a meeting. Before meeting conduct is covered in detail, you should now complete *Reviewing a Past Meeting* in Attachment 6. The purpose of completing the worksheet at this time is to demonstrate through your own experience how most meetings do not contain the critical elements for success, are not conducted efficiently, and are often poorly planned. Further, after seeing the results of this exercise, it is hoped that it will provide an extra incentive for you to pay close attention to the meeting conduct section.

Before completing the worksheet, take a moment to think back to a recent meeting you attended. To be current in your memory it is preferable that the meeting will have been within the last week. Now, please turn to the worksheet and complete it. Start by filling out the top, which pertains to the chosen meeting topic and date, then go on to the meeting purpose and meeting objectives. After these are filled in, go ahead and complete the boxes. Finally, glance back over the completed worksheet, think back to the essential elements for meeting success discussed previously, and fill in the "How could the meeting have been improved?" section.

So, what did you find? Was the meeting a text book example of planning and effectiveness, or was it hastily prepared and poorly run? Could you identify the purpose for the meeting and was the meeting conducted to achieve that purpose? Did the meeting drag-on wasting both your time and the time of the others? It is hoped for the sake of the Air Force and your organization that the meeting you chose was a case study in effectiveness; however, it probably was not. If the meeting you evaluated was an excellent one, then you are one step ahead of most of us and ready to use this guide to fine tune your meeting skills learned from previous observations. If the meeting you evaluated was less than successful, especially if you were the meeting leader, there is hope. What you should do is continue reading, study the information presented in this guide, and apply the information. Later, when you get a chance to conduct your next meeting, do so with the principles in mind. Then, complete the *Reviewing a Past Meeting* worksheet on your meeting!

It is now time to discuss how to conduct a successful meeting.

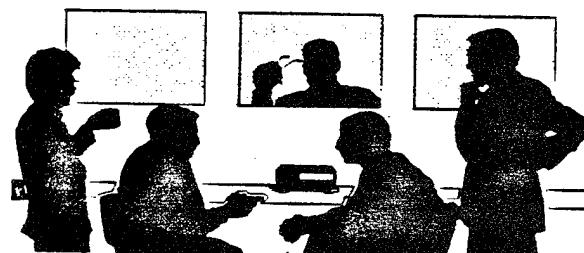
## **CONDUCTING A SUCCESSFUL ORGANIZATIONAL MEETING**

You have read about how to plan for successful meetings, and now it is time for further instructions on conduct. This section focuses on conducting an information gathering meeting or decision making meeting. If you are to lead a training meeting, the same basic concepts apply.

**1. Reminder.** One to two days before the meeting is scheduled, call or send participants a meeting reminder as in Attachment 7 *Meeting Reminder/Notice*. The meeting reminder serves as a memory jogger to ensure participants are aware of the meeting and know what to expect of the meeting. Perhaps more importantly, the meeting reminder shows that you, as the meeting leader, mean business; you are organized, prepared, and committed to conducting the meeting effectively. Psychologically such a message carries more weight than one might think! Depending on when the agendas were sent out, it may be a good idea to attach a copy of the agenda to the meeting reminder. Further, the format in Attachment 7 can be easily put into electronic format and sent via e-mail!

**2. Review Earlier Planning.** Within an hour of the meeting start time, review the completed meeting organizer your prepared in the planning phase (Attachment 1 *Meeting Organizer*). You need to be focusing not only on the purpose and objectives of the meeting before you, but also on the management of the meeting – the conduct. Part II of the meeting organizer provides six basic bullets to get you on the road towards a successful meeting.

- \* Open with the purpose
- \* Assign minutes
- \* Encourage participation
- \* Prevent domination by any one member
- \* Summarize decisions, key points, and responsibilities
- \* Plan for follow-up



Review these bullets and follow them!

**3. Start!** Now, it is important to get your meeting off to a positive beginning. As with first impressions of people, there are also first impressions of meetings. Always begin on time. If you do not know all of the participants, introduce yourself and say a few words about your background. Even if you do know everyone well, start the meeting formally with a welcome. This formally marks the beginning of the meeting and sets the stage for your next move, which is to clearly express the purpose of the meeting and the objectives to accomplish during the meeting. Let everyone know that you intend to stick to the planned stop time and therefore need their help in staying focused so that you can progress through the agenda items. To stay focused you may need to require participants to take roles such as timekeeper and referee. This can make it easier for participants to keep on track and interact in accordance with the group norms.

Depending on your familiarity with the members you may need to lay some ground rules. Ground rules are often needed regarding such areas as respecting the person who is talking, no personal attacks allowed, and how consensus, majority rule, and the leader's thoughts will be used in decision making. Some experienced meeting leaders recommend using two overhead projectors at this point: one to display the meeting purpose and the second to display the agenda. This is something that each person must decide on their own. However, remember that while overheads can be a valuable tool, they often take people's attention away from you.

**A. Facilitator.** Some meetings require a separate facilitator aside from the meeting leader. A facilitator's role is to ensure the meeting process progresses properly without regard to content. On the other hand, the meeting leader is greatly concerned with the content of discussion and the outcome. Thus, there is a difference in focus between the two roles. In most meetings the meeting leader takes both roles and must find a balance between process and outcomes. When the leader has difficulty striking this balance, or when the meeting leader wishes to take himself out of the meeting foreground, use of a facilitator is wise.

**B. Icebreaker.** If it has been a rough day and the folks are a little tired, try an icebreaker. Mentally or physically exhausted participants will not help your meeting to succeed! Ask everyone to stand up for 10 seconds and stretch, have members introduce themselves and state one thing they plan to do in the upcoming

weekend, or keep a small supply of jokes or overhead cartoons with you to create some liveliness. These are just a few examples and more can be found in the Business Section of your local bookstore.



**C. Late Arrivals.** If a participant comes in late, do not stop the meeting to bring them up to speed; make it somewhat uncomfortable for them. If possible, arrange the room so that late comers are noticed by everyone and unable to "sneak in". Another distraction involves those who have secretaries or associates bring them messages. Granted, some things are vital and must be attended to, but make it the exception and not the rule. Unfortunately, you may need to openly state such a rule.

**D. What's At Stake?** As the meeting begins, keep in mind that participants will do their best when they realize the importance of the meeting. This is especially true when the participants stand to be either personally hurt or helped. Do not cry wolf, but if there are big stakes involved, let them know it.

**E. Open Discussion.** Starting with the first agenda item and all subsequent agenda items, introduce it, establish how much time can be spent on it, state how it relates to the purpose, and ask for comments. You must be willing to hear what others have to say, both good and bad.



Foster openness and do not "shoot the messenger" for bringing up discouraging but truthful news. If you do "shoot the messenger", or are close minded, participants will learn very quickly not to rock the boat. As a result, your meetings will become anything but effective. Further, you would be wasting the time of those involved. Therefore, make a conscious effort to both draw-out ideas from others and to really listen to those ideas.

**F. Encourage.** Encouraging participation is not as easy as it sounds; sometimes people are afraid to speak out in front of others, do not want to appear stupid, or are otherwise afraid of rejection. To make it easier for members to participate ensure that members do not criticize each other; drive out the fear that a person's ideas will be met with ridicule or mockery from other participants. Fear of criticism often occurs when there is a meeting bully.

(1) **Meeting Bullies.** A meeting bully is a person that exhibits one or more of the following characteristics: consciously or subconsciously insists on making comments (often snide), has an opinion on everything and expresses it, tends to be long winded with unnecessary and irrelevant details, and generally tries to dominate discussions to his point of view. Maintaining control of a meeting bully is vital! Failure to do so will destroy the synergy and progress of your group. Fortunately group behavior will broadcast signs of bullying so that even the most unperceptive leader is made aware; look for shifting of chairs, participants looking around the room, side discussions, and people working on other tasks. When these occur you must do something.

(2) **Bully Tactics.** When the meeting bully is beginning his monologue, jump in when he breaks for air and say something along the lines of, "That's very interesting, now let's relate that back to the agenda." An alternate but more severe method for dealing with a persistent bully is to:

- \* Name and identify the behavior – openly tell the person that he is distracting the group and hindering the meeting by his constant interruptions and lack of focus.
- \* State the impact of his actions – go on to state that the purpose for the meeting is an important one and that you cannot allow him to de-rail it.
- \* Suggest a more appropriate behavior – finish by expressing that he has value to the group but needs to participate appropriately.

The next level of graduated response deals with the person's "space." If you are in a position to walk around while leading the meeting, walk over to the bully and occupy his personal space – either just behind his chair or standing next to him. This makes most people uncomfortable and will usually cause an alteration of behavior. If neither of these steps work, take the bully aside at a break and lay it on the line – either

he quit disrupting the group or he leaves. It just may come down to asking the person to leave, but this is unlikely. Please note that these same methods can be effective when dealing with conflict in the group.

**G. Group Conflict.** Conflict is not necessarily good nor bad. There are two types of conflict, functional and dysfunctional. Functional conflict includes confrontation that enhances group performance and often manifests itself through new ideas and creativity. Dysfunctional conflict hinders group goal achievement and often takes the form of blaming, attacking, and avoiding responsibility. Your task is to recognize the difference between the two types and to prevent the latter. The fine line separating functional from dysfunctional conflict is a hard one to recognize and this results in leaders often trying to stop all forms of conflict. This is not a good approach. The effective meeting leader will educate himself on this subject because the effects of functional conflict can reap wonderful benefits in meetings and organizations.



**H. Groupthink.** The opposite of conflict is groupthink – something to avoid. Typically, groupthink occurs in highly cohesive groups as individuals lose their independent thinking. Specifically, groupthink is the destruction of moral judgment and mental independence among individual group members. A result of groupthink is participants who are unwilling to speak-out against group ideas in the interest of group solidarity; members feel pressure to conform to the group. One method useful in avoiding groupthink is to foster a certain level of functional conflict through disagreement. Make it known that you do not want a bunch of "yes" men and women and that you will not punish those who disagree. Let it be known that you expect total support once a decision is settled upon, but until then you want to hear dissenting views when they exist.

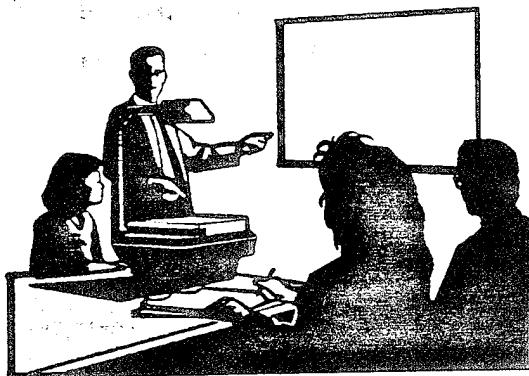
**I. Ask Questions.** Getting back to the issue of encouraging participation, learn how to ask the proper type of questions of your participants in order to draw-out their participation. This does not mean asking questions along the lines of a prosecuting attorney but that of the inquisitive professor. You can ask questions to:

- \* identify events or recall a situation when trying to establish circumstances and background for the group – "What happened next?" or

- \* prompt thinking and analysis of an issue - "Where is this process faulty? How would you improve it?"

When re-directing a question posed to you that you want someone else to answer try, "That's a valid question Bill. Alan, could you please try to explain why you think the decision was made?" Re-directing in particular can be effective to withdraw yourself as the "fountain of knowledge" and to promote discussion among the group.

J. Brainstorming. When the topic needs extensive creativity, a quick brainstorming session may be appropriate. Brainstorming is the process of gathering a wide range of free-flowing ideas to later evaluate and aid in decision making. In brainstorming each person is allowed to offer one idea at a time. During idea gathering no editing or evaluating of ideas takes place. Only after all ideas are documented are ideas evaluated and further explored. This process can be done by having a recorder write down the ideas presented by a group on either a white board, overhead transparency, or large sheet of paper. No ideas are to ever receive criticism. After finishing the brainstorming, the group evaluates the documented ideas and either picks one or chooses to explore a few in further depth.



(1) Evaluation Upon Merit. Integral to both brainstorming and normal discussion is the idea that all ideas should receive evaluation on their merits without consideration of who stated the idea. Participants embody varying levels of organizational power which do not necessarily correlate to the quality of their ideas. Under normal circumstances, people are wary to disagree with someone higher in position than they are while others tend to look down upon ideas generated by junior

members. To truly have quality discussion your meetings must be fair in all respects and this includes the evaluation of ideas.

**K. Involvement.** When participants are content to be wall flowers, you have a problem; do not let them. Enact role playing or direct your comments to such members to force them into involvement. Remind each member that they were invited specifically because they are needed to accomplish the purpose. Reiterate that if they are not participative, they hurt the whole group and ultimately the organization.

**L. Stay Focused.** It is important that you keep focused on the meeting purpose and work to accomplish the objectives; often discussion tends to drift away from the issues and you should use the agenda to reel participants back. Once adequate discussion is complete, you need to bring closure to the topic before going to the next agenda item. In addition, summarize each agenda item before progressing to the next item. For decision making meetings, some meeting leaders favor a group vote. A disadvantage of group voting is that there are times when a decision must be made by one person – the leader – and leaving the decision to a group is not effective. As the leader of the meeting, you must remember that you are still responsible and that the participative meeting approach does not absolve you of that responsibility. Therefore, you will need to find what is comfortable for you depending on your personality and the situation. Whatever method you choose to make decisions, it should be understood by all in attendance.

Invariably, during discussion items not relevant to the topic at hand will surface. Try keeping an *Issue Board* where these items can be "shelved" and then briefly covered at the end of the meeting.

**M. Be Flexible.** Unfortunately, even with the best meeting management, some agenda items drag. If the issue is one that does not require an immediate decision or action, it may be best to set it aside and go to the next item. The reason for this is to keep things flowing or risk losing the attention of the participants. Also, you must be committed to finishing the meeting on time. If the item does require immediate action you have two choices. First, you may have to make a decision on the spot. Second, if this alternative is not viable, you may have to close discussion and take some time after the meeting to weigh the facts before coming to a decision. Either way, press on to the next topic.

**N. Participant Ownership.** Critical to leading effective meetings is the concept of ownership. The idea is to foster the feeling of ownership down to the lowest levels possible in an organization. Ownership results in interest and commitment, two keys for a successful meeting. When dealing with meetings, as the leader your goal should be to help the participants take ownership of the meeting. This translates into feelings of responsibility for the progress of the meeting, the material discussed, and the outcomes. A leader can do this by treating people fairly, only calling a meeting when necessary, truly listening and considering presented ideas, and providing a constructive and supportive meeting environment.

**O. Close the Meeting.** As mentioned earlier, an essential aspect of meeting management is to finish on time. Some leaders make a contract with meeting members that if a meeting runs late, the leader buys coffee or donuts at the next meeting. There needs to be something small but tangible to help enforce this requirement. Further, if you accomplish the purpose before the stated ending time, stop! In order to finish on time, leave yourself three or four minutes to conclude the meeting. Spend that time summarizing the important points covered as well as important decisions made. If you assigned action items, review the items including who is responsible and when action is due. Wrap up any loose ends and ensure the individual who will prepare the meeting minutes does not have any questions. Re-cap the original purpose of the meeting and what was accomplished. If possible, perform a quick evaluation of the meeting as a group. Thank the group for their participation and assistance and let them leave.



#### **USE OF COMPUTERS**

The purpose of this guide is to create a tool that can apply to any organization to help that organization improve its meetings. Over the last several years advances in computer software and hardware have helped to automate meetings towards a similar purpose. Today, with the help of computerized group support systems (GSS), meeting leaders have a variety of tools to assist them in on-line brainstorming, idea generation, and group decision making. Unfortunately at this time the costs of implementing such systems is prohibitive to many small organizations. Because computerized applications

are not a standard part of every organization their use in meeting management is not discussed. However, due to constantly changing technology it is only a matter of time before these tools are a standard part of every organization. Therefore, meeting leaders need to be aware of computerized tools as a supplement to their meeting skills and should in no way expect that computerized tools will eliminate the need for personal meeting skills.

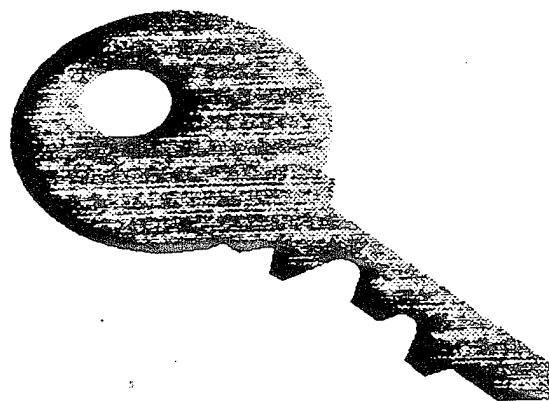
## SUMMARY

You have finished reading the critical information most relevant to your success in planning and leading organizational meetings. The information presented does not hold true for only the Air Force or the Department of Defense, but for all organizations around the world. What you do with this information is up to you. However, it is hoped that you will take it, use it, share it, and improve upon it. With this aim in mind Attachment 8, *Essential Meeting Points*, is included as a one page summary for your use and for you to give to others.

At this stage the phrase "quality is free" comes to mind. This phrase means that in the short term producing a high quality product involves more money and time than producing a low quality product. However, the extra expense associated with the high quality product is more than compensated for by the longer term increased efficiency, effectiveness, and customer satisfaction. The same is true for meeting management. To become a quality meeting leader one must invest time, initiative, and energy -- all "costs" to the person. On the positive side, these "costs" are more than paid for by the vast potential improvements in organizational meetings.

Use the first eight attachments to keep you focused on your task at hand -- leading meetings. Further, if you desire additional reading material on this subject, reference Attachment 9 *Works Referenced* for a listing of material that helped form the literature base for this guide.

The key to change is now in your hand; will you use it?



## Attachment 1: **Meeting Organizer**

### PART I - COMPLETE DURING PLANNING

Date of meeting: \_\_\_\_\_  
Purpose & objectives:  
\_\_\_\_\_  
\_\_\_\_\_

Place: \_\_\_\_\_

Time	Start:	Stop:	Total Hrs:
------	--------	-------	------------

Participants: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

#### Agenda Items to Discuss:

<input type="checkbox"/>	_____

<input type="checkbox"/>	_____

(In the boxes arrange the proper sequence)

#### Agenda:

- time (start and ending)
- location
- subject
- list of attendees
- purpose & objectives
- distribute in advance

#### Facilities:

- lighting and ventilation
- proper size/space
- quiet
- special equipment
- available
- reserved

#### Notice:

- participants notified
- reminder sent

---

### PART II - REVIEW JUST PRIOR TO MEETING

#### Conduct:

- \* open with the purpose
- \* prevent domination by any one member
- \* summarize decisions, key points & responsibilities
- \* encourage participation
- \* minutes assigned?
- \* plan for follow-up

#### Additional Considerations:

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**Attachment 2: Meeting Agenda Worksheet**

Purpose:

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Meeting Date: \_\_\_\_\_ Meeting Start: \_\_\_\_\_ Meeting End: \_\_\_\_\_

Meeting Place: \_\_\_\_\_ Meeting Chaired By: \_\_\_\_\_

Participants:

Name	Division	Extension
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

Agenda Items

Description	Time Length
1.	
2.	
3.	
4.	
5.	
6.	
7.	

Special Information:

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### **Attachment 3: *Meeting Minutes Worksheet***

Date: \_\_\_\_\_

**Topic:** \_\_\_\_\_

**Start/end time:** \_\_\_\_\_

## **Meeting Leader:**

## Purpose:

#### **Key Discussion Points:**

(continue on back or on separate sheet)

#### Action Item Responsibility:

Copy of Agenda Attached  
 Listing of Participants Attached

**Distribute Completed Minutes to All Participants Within 48 Hours**

**Attachment 4: Post-Meeting Self Evaluation Form**  
(check all boxes that apply)

Date: \_\_\_\_\_

Topic: \_\_\_\_\_

Purpose: \_\_\_\_\_

• Planning & Preparation:

meeting was necessary  
 alternatives were not appropriate

knew meeting purpose  
 had a game plan

• Pre-meeting Administration:

purpose/objectives clear  
 length appropriate  
 location optimal  
 only necessary participants invited

agenda distributed in advance  
 time of day appropriate  
 good seating arrangement  
 proper group size

• Meeting Execution:

reminder sent  
 purpose established at the beginning  
 encouraged participation  
 decision agreed to without a vote  
 did not bog down on a topic  
 minutes completed

meeting began on time  
 visual aids used if possible  
 discussion lively  
 discouraged meeting disrupters  
 summarized important points

• Post Evaluation and Follow-Up:

some form of evaluation used

open items closed

One thing I really messed up:

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One thing I did really well:

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Next time remember to:

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**Attachment 5: Group Post-Meeting Evaluation Form**

Date: \_\_\_\_\_

Topic: \_\_\_\_\_

Purpose: \_\_\_\_\_

Use the following rating scale:

1 - Never

2 - Hardly

3 - Sometimes

4 - Usually

5 - Always

Or answer Yes or No

1. Participation was fostered.	1	2	3	4	5
2. Discussion was focused or brought back to focus when it strayed.	1	2	3	4	5
3. Discussion progressed through issues.	1	2	3	4	5
4. Only those truly necessary were invited.	1	2	3	4	5
5. Everyone participated.	1	2	3	4	5
6. Alternative views were encouraged.	1	2	3	4	5
7. Participants were receptive to other ideas.	1	2	3	4	5
8. The leader was receptive to other ideas.	1	2	3	4	5
9. The purpose and objectives of this meeting were clear and stated.			Yes	No	
10. The agenda was adequate			Yes	No	
11. The agenda was distributed in advance.			Yes	No	
12. A reminder of the meeting was sent.			Yes	No	
13. The meeting was effectively conducted.			Yes	No	
14. The meeting was effectively concluded.			Yes	No	
15. The purpose and objectives were achieved.			Yes	No	
16. Responsibility for action items is clear.			Yes	No	
17. My conduct and participation was helpful to the group.			Yes	No	

### **Attachment 6: Reviewing a Past Meeting**

Topic: \_\_\_\_\_

Date: \_\_\_\_\_

Meeting Purpose:

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Meeting Objectives:

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Type of Meeting Attended:

- informational/training
- idea generating
- decision making
- other \_\_\_\_\_

Was the Meeting Productive?

- yes
- no

I was a:

- leader of the meeting
- participant of the meeting

Was the Leader Prepared?

- yes
- no

Was an Agenda Used?

- yes
- no

If yes, was it distributed in advance?

- yes
- no

How Many People Were in Attendance? \_\_\_\_\_

Were the Right People In Attendance?

- yes
- no

Did it Start and End on Time?

- yes
- no

Did Participants Contribute?

- yes
- no

Was Participation Encouraged?

- yes how, \_\_\_\_\_
- no

Room Size

- too big
- too small
- proper size

Meeting Length

- too long why? \_\_\_\_\_
- too short why? \_\_\_\_\_
- proper length

**Room Accommodations**

conducive  
 not conducive

**Were minutes completed?**

yes  
 no

**Were action items followed-up on?**

yes  
 no

**Meeting timing - good time of day?**

yes  
 no

**Was a post-meeting evaluation done?**

yes  
 no

**Could meeting purpose been achieved without a meeting?**

yes, how? \_\_\_\_\_  
 no

**How Could the Meeting Have Been Improved?**

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#### **Attachment 7: Meeting Reminder/Notice**

Date of Reminder: \_\_\_\_\_ By: \_\_\_\_\_

**Meeting Purpose:**

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**Meeting Date:** \_\_\_\_\_ **Meeting Start:** \_\_\_\_\_ **Meeting End:** \_\_\_\_\_

Meeting Place: \_\_\_\_\_ Meeting Chaired By: \_\_\_\_\_

### **Participants:**

#### **Preparation or Materials to Bring:**

If Unable to Attend, Notify: \_\_\_\_\_  
Extension: \_\_\_\_\_  
No Later Than: \_\_\_\_\_

*Thank you and see you there!*



## **Attachment 8: Essential Meeting Points**

### **Before the Meeting**

- Write out your specific purpose and objectives for meeting.
- Determine how long the meeting should last.
- Decide who you need to be in attendance.
- Pick a meeting location and reserve it if necessary.
- Schedule the meeting to best accommodate those involved.
- Prepare an agenda and distribute it in advance to all participants.
- Send a meeting reminder.

### **During the Meeting**

- Review your purpose and objectives prior to the meeting start.
- Start on time, formally begin the meeting, and explain the purpose and objectives.
- Use an icebreaker.
- Introduce the first agenda item and explain its relevance.
- Encourage participation from all members.
- Use brainstorming when necessary to gather ideas.
- Fairly evaluate all ideas regardless of source.
- Keep meeting bullies in check.
- Do not stop functional conflict.
- Bring each agenda item to closure.
- Re-cap meeting accomplishments and action-items.
- End on time.

### **After the Meeting**

- Assign someone to prepare the meeting minutes.
- Evaluate the meeting.
- Distribute meeting minutes within 48 hours.

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Vita

Capt Zackery S. Belcher was born on 22 September 1968 in Merced, California. He graduated from Elk Grove High School in Elk Grove, California in 1986 and then entered the United States Air Force Academy in Colorado Springs, Colorado. He graduated from the Academy with a Bachelor of Science degree in Economics in May 1990. Upon graduation he received a Regular Commission in the USAF, and began his first assignment at Loring AFB, Maine, as a Contract Management Officer. His second assignment was as a matrixed contracting buyer at Brooks AFB, Texas, in the Human Systems Center (HSC) Systems Program Office. While at Brooks AFB he earned a Master of Business Administration degree in Aviation from Embry-Riddle Aeronautical University. In June 1994, he entered the School of Logistics and Acquisition Management, Air Force Institute of Technology. Captain Belcher is married to the former Nancy Knickerbocker of Elk Grove, California and they are expecting their first child.

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